

How Altruic Advisors, CPAs Drives Efficiencies and Data Security with CCH Axxess™



Starting a new firm from the ground up takes guts, hard work and a great deal of planning. Just ask Ryan Hagan, a founding partner of Altruic Advisors, a CPA firm only serving nonprofit organizations with offices in Colorado and Michigan, and a client roster made up of small to midsize nonprofit organizations.

In 2012, Ryan and his small group of accountants set out to serve nonprofit organizations committed to making the world a better place. Hagan interviewed over 100 nonprofits to get a better understanding of their unmet needs. He found that most struggled with secure communication and document storage and searched for a solution that could streamline communication securely. Within the firm's cloud-based accounting service, branded as *CFO Solutions*, they chose CCH Axxess, the award-winning¹ cloud-based solution built on a single platform and designed to help firms grow, manage and protect their business.

“Many nonprofits struggle with communication between the bookkeeper, executive director, finance committee and auditor. The fact that those four key stakeholders are often in different geographic locations and have a fiduciary responsibility to safeguard financial documents further complicates the process. CCH Axxess offers us the security, flexibility and scalability to fit our many needs and keep our practice and our clients' documents extremely organized.”

Ryan Hagan
Founding Partner, Altruic Advisors

That organization comes from CCH Axxess' integrated common platform, which enables firms to deliver tax preparation, compliance, document portals, work flow and practice management solutions using a single common database and common services. The single client database with fully integrated tools enables seamless data exchange between all CCH Axxess modules. Not only does it streamline communication, but since it's cloud-based, it also provides multiple people at different locations with secure access to important documents.

The intuitive, centralized dashboard can be configured to show users exactly what they need to do their jobs. The solution is tightly integrated with Microsoft® Excel®, Outlook® and Word, making it easier to interface with those local applications. All data, calculations and business logic are housed within the cloud-based common core database.

24/7 Access and Data Security

With CCH Axxess, Altruic Advisors is able to be both responsive and proactive by offering clients 24/7 document access from any computing device, including mobile devices. Serving as an online file cabinet, the solution eliminates the risk-prone practice of exchanging documents via email and provides confidence that all data is safe and secure.

“Data security is a big concern for us and our clients, and we don't want our clients sending sensitive files to us as an email attachment. Instead, they upload all important information to the CCH Axxess™ Portal, which houses all documents and enables us to have a paperless office. Our clients love the idea of being able to access any document at any time and appreciate the added value we can deliver.”

Altruic Advisors, CPAs

- Full-service CPA firm serving nonprofit organizations
- Founded in 2012
- Four offices in Colorado and Michigan
- Eight staff and growing
- Support the accounting needs of 50+ nonprofit organizations

Gaining Efficiencies through Streamlined Internal Processes

CCH Access also helped streamline Altruic Advisor's CFO Solutions service at audit time. During audits, the firm provides auditors with access to the CCH Access Portal. Since everything is hosted in the cloud, auditors can work remotely, which significantly reduces the time auditors spend doing field work and allows them to perform higher-value planning and advisory work.

“When the auditors are ready to begin the audit fieldwork, they are able to access most documents through the CCH Access Portal. From there, they can bring the documents into their audit engagement software. This helps reduce or eliminate the need to ask the client to copy or scan these documents. We have had auditors tell us that this process is three times as fast as rummaging through copies and scanning them, which helps audit firms increase their realization. And since the filing structure is the same across all of Altruic Advisors' clients, we save on administrative time and can take on more clients with minimal staff.”

Seamless, Expert Implementation and Maintenance

Every new CCH Access customer gets assigned an implementation consultant to ensure the migration to the cloud goes smoothly. As a cloud-based solution, there's no need for IT staff to conduct time-intensive software updates. Wolters Kluwer, CCH handles all CCH Access maintenance, updating all modules automatically in the cloud. In addition, Wolters Kluwer, CCH provides end-user and administrator training to get staff up to speed on each of the integrated modules, including:

- **CCH Access™ Document** — Achieve centralized document management in the cloud.
- **CCH Access Portal** — Mitigate risk, support client privacy and gain a competitive edge by delivering better client service.
- **CCH Access™ Practice** — Maximize billable hours and streamline administrative work.
- **CCH Access™ Tax** — Obtain an intelligent tax preparation, compliance and work flow solution specifically built for the cloud.
- **CCH Access™ Workstream** — Increase your profitability with a full-featured solution designed to efficiently manage all of your deliverables.

“We're very happy with our investment in CCH Access because it makes it easy for our staff and our clients to find, share and keep track of important documents. Making the important decision to go with Wolters Kluwer, CCH early on, we have been able to provide a level of service comparable to much larger firms, and as we've grown, Wolters Kluwer, CCH has been there for us every step of the way.”

Using CCH Access, Altruic Advisors, CPAs was able to:

- Save even more time through tight integration and smooth work flow
- Standardize firm practices and procedures across offices
- Eliminate the need for server updates
- Help auditors achieve three times the efficiency by eliminating labor-intensive paper processes
- Create a safe and secure means of exchanging documents with clients

For More Information
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