



Collecting Client Financial Information With PDFfiller

How NYOBC uses PDFfiller to Get Clients to Fill Out Income Tax Forms

Who?

Kevin R. Minkoff, CPA, PC, Not Your Ordinary Bean Counters (NYOBC), is a small firm with four employees that goes beyond the average financial services firm. The name itself, “Not your ordinary bean counter,” suggests their eponymous approach to accounting – NYOBC engages in a variety of services for its customers in Oregon, Washington, California and goes beyond the range of the average accounting firm. Based in Portland, Oregon with four employees NYOBC takes a customer-focused approach to its business serving hundreds of clients across the west coast.

Kevin R. Minkoff is a certified global management accountant (CGMA) and certified public accountant (CPA) and offers tax preparation and financial and management consulting for small to medium sized businesses. He also helps clients with the compilation and review of financial statements, accounting efficiency, streamlining information systems, and works as an outsourced chief financial officer (CFO) for all types of businesses entities, from sole proprietorship to corporations. Minkoff and NYOBC give particular “attention to technology integration and simplifying the complex,” said Minkoff. PDFfiller assists in that effort, helping NYOBC’s clients use the smartest, simplest technology to edit and complete documents online.

The Problem

While emphasizing client communication and outreach, Minkoff and NYOBC were faced with a problem: clients weren’t able to fill in electronic “income tax organizers” effectively. We are using PDFfiller for “providing clients with a PDF editing program so they could fill out their income tax organizers,” said Minkoff.



Mr. Minkoff specializes in taxation, computerization and management consulting for small and medium sized businesses. Between his own CPA expertise, his fantastic team of bookkeepers, and his on-staff Quickbooks Certified Professionals, business clients have been receiving fantastic service since 1997.

Before PDFfiller, Minkoff was forced to use electronic forms that he had created in a desktop PDF editor, “sending my clients a fillable PDF created in a desktop PDF editor” that was tedious, cumbersome and far less than adequate.



“The problem is these fillable PDFs, from the desktop PDF editor, were not able to be saved with the filled in information intact, thereby not allowing my clients to fill out these forms in multiple sessions,” Minkoff said.

While Minkoff saw the benefit of electronic forms, “clients not being able to save their progress filling out a PDF form meant that most were not interested in using the fillable PDF forms,” Minkoff said. This meant that NYOBC accounting was functioning with an inefficient, fragmented, and less than ideal workflow, costing its customers and its employees time, energy and money.

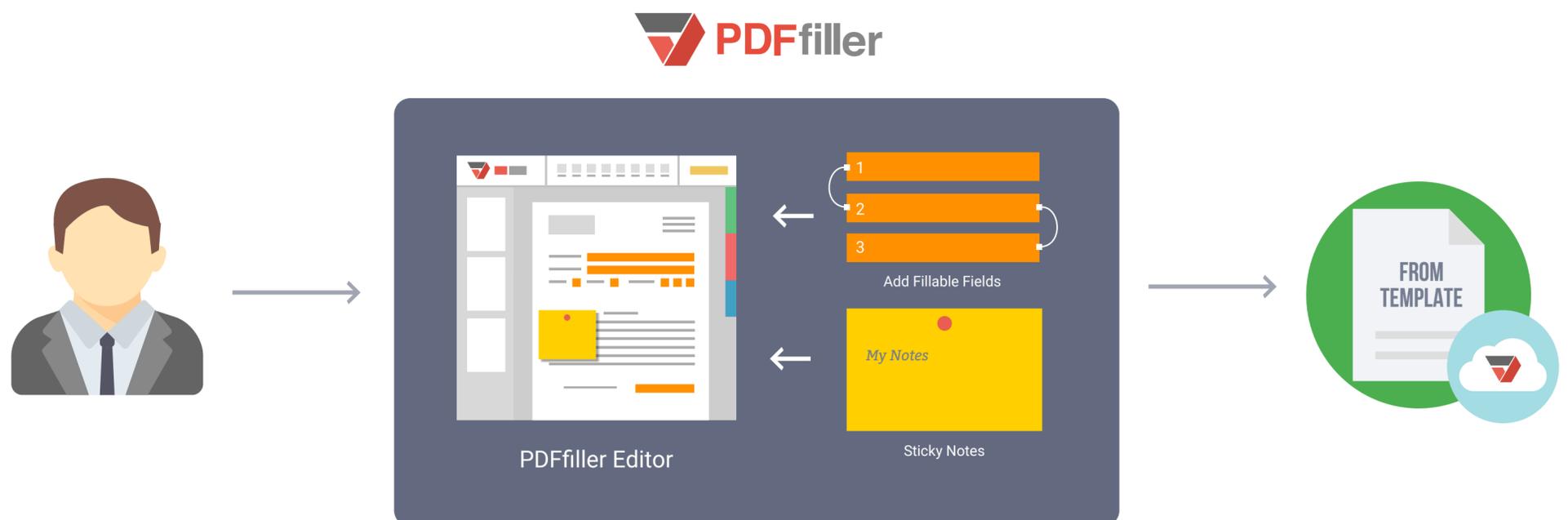
Fortunately, after a Google search, Minkoff found PDFfiller, the best way to edit and complete PDF documents online. The switch was “very easy,” Minkoff said.

The Solution: PDFfiller

Because Minkoff is using PDFfiller to collect tax information, he and three other people on his team use it “very often January through April (during tax season).”

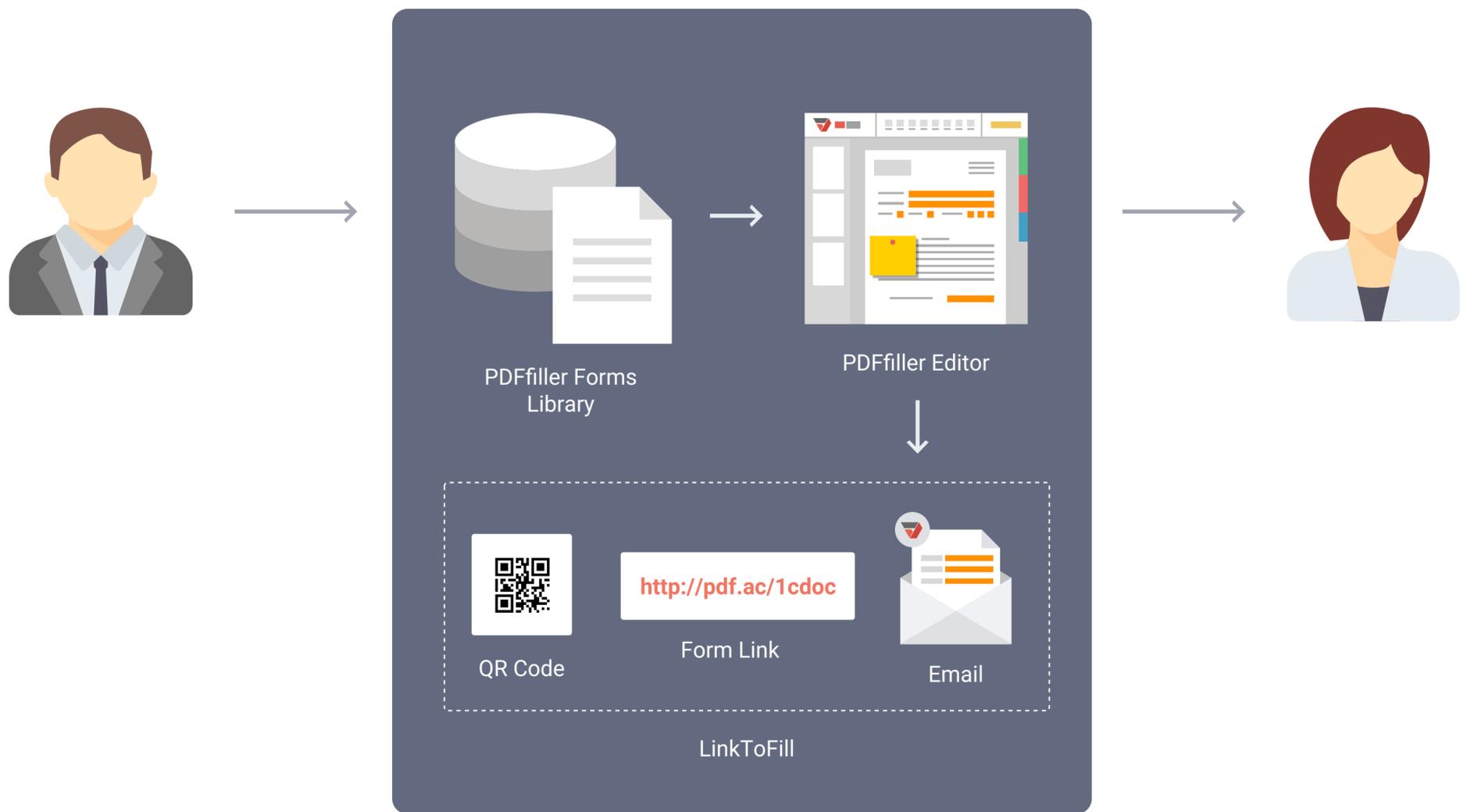
PDFfiller offers accounting firms a number of benefits for internal use: the same electronic form completion Minkoff uses for his clients, a huge library of fillable tax documents, document editing tools, and even powerful features like SendToSign, which enables users to send documents to others for signature.

Minkoff uses it primarily for making it easy for his clients to “edit and complete PDFs online.” Now, with PDFfiller, “PDFs can be completed in multiple sessions,” said Minkoff, and it’s easy for users to “save all data entered and return later to complete the forms.”



The Fillable form creation process

It’s easy to create a fillable form in PDFfiller. Users can choose from a database of over 25 million fillable documents, download a document from the internet, or upload a form from their computer. Turning a regular form into a fillable PDF document is as simple as using PDFfiller’s proprietary “drag and drop wizard”, which enables users to add fillable fields to a form with a click of the mouse. Advanced features in PDFfiller include the ability to create a template, automatically add certain information to a form, requiring users to add contact information, and making certain fields mandatory.



The document distribution process

PDFfiller enables Minkoff and others in similar positions to connect with clients and collect data in a number of different ways. Users can send documents directly to specific clients to complete using LinkToFill, which enables PDFfiller customers to send forms to an unlimited number of clients using a URL, QR code or message. PDFfiller forms can also be integrated directly into a website, allowing users to access it and submit it directly from your site. Alternatively, it's easy just to email a powerful fillable form to specific users to complete whenever you need to.

PDFfiller "was a very good solution," said Minkoff. Its unique and powerful ability to collect information from clients makes it the perfect solution to NYOBC's problems.

The Benefits of PDFfiller



Speed

PDFfiller is the fastest way to collect and collate information from clients. Going Digital with PDFfiller makes it faster for users to submit information and much quicker for Minkoff and NYOBC to process them. “Creating and using the program is quite simple and fast,” said Minkoff.

An easy to use graphical user interface, unique features, and an always-available document library and personal document storage means that working on, distributing and collecting information from your forms has never been faster.



Convenience

PDFfiller is “very convenient,” said Minkoff. It’s simple to create a fillable form and send it for completion to other users. And proprietary features like LinkToFill, SendToSign, and powerful editing tools like editing, redaction, highlighting and sticky notes mean that PDFfiller is the best way to distribute forms, collect information and manipulate your forms.



Savings

PDFfiller saves time and energy, meaning Minkoff and NYOBC can spend more time with clients and engaging in tax and consulting work than trying to collect information. The time saved is another resource that Minkoff and his co-workers can invest into their thriving small business.



Ease-of-use

PDFfiller is the easiest way to create, send, complete, sign, manage and store documents. “Yes, it’s easy to use”, said Minkoff – even powerful features are easy to understand with PDFfiller’s simple GUI – and with a powerful online interface, your documents are always available, wherever, whenever, and on any internet-connected device.



Security

PDFfiller provides an ultra-secure way to create, send, and store your documents. Unlimited document storage replete with high-grade security means your documents are always available and always safe. Amazon’s S3 servers provide redundant backup and strong physical security while PDFfiller’s features like PIN codes, two-factor authentication, and audit trail, mean you can keep track of account access and provide an additional layer of security to your whole account or specific documents.



Customer Support

PDFfiller’s customer service is available 24/7. “When I needed to consult the customer service team,” Minkoff said, “they were knowledgeable enough to solve any problem I was having.” PDFfiller’s team of trained customer service experts are always available to help users solve problems they may come across when using PDFfiller or trying to integrate it into their workflow effectively.



Ecological Benefits

The average office worker uses 10,000 sheets of paper every year. In a paper-heavy office, like NYOBC’s, this figure could be even higher. PDFfiller can help make sure this figure stays low. And because

Minkoff collects information from clients regularly, PDFfiller also saves on the ecological costs associated with posting forms or printing documents. “It certainly helped NYOBC go green,” said Minkoff, “as we are and have been a “paperless” office for the last couple of years.”

Conclusion

PDFfiller is the most effective way to distribute forms to, and collect information from, clients. With a variety of powerful features to make the process of creating and sending fillable forms simple, on a secure, easy-to-use online platform that allows users to access their documents from anywhere, at any time, and on any internet connected device, PDFfiller is the best document management platform. “It is a very convenient, fast and easy way to create, edit and complete fillable PDF forms,” Minkoff said, making it the perfect document management solution for accounting firms.

Without PDFfiller



With PDFfiller – 5 MINS

