

CASE STUDY

40-Year Tax Veteran Ditches In-House Server Headaches for Secure Cloud Infrastructure



FIRM SNAPSHOT

- **Firm:** Anna Stevens Tax Services
- **Owner:** Anna Stevens
- **Staff:** Small firm with 2-3 employees
- **Years in Business:** 40+ years
- **Previous Setup:** In-house server with local IT support
- **Software:** QuickBooks, tax software

THE CHALLENGE

Anna Stevens has seen it all in 40 years of tax preparation from paper and pencil to carbon copies to desktop computers. She's not one to chase new technology, but she knows when it's time to make a change.

"I don't like to make changes," she admits. "But I'm always looking to streamline our operations and make things more efficient."

For years, her firm ran on an in-house server with individual desktop computers. A local IT guy handled issues as they came up. It worked until it didn't.

"We went through a couple times in the last 10 or 12 years where we had to replace a hard drive and restore backed up data. That whole thing was a mess. **I didn't want to repeat that.**"

The risks kept growing. **Security breaches.** Hardware failures. Her IT guy stopped offering service. Her kids helped occasionally, but that wasn't sustainable for a professional practice.

"The more we talk about security and breaches and needing to protect ourselves, that's when Verito came into play. I wanted a safe, secure environment to work in."

WHY VERITO

Anna discovered Verito at an NATP conference in Orlando probably several years ago now, though the exact timeline blurs together.

"I'm sure I talked to somebody there. I didn't jump on board the first time I heard about Verito. I did some research and checked in."

The decision came down to timing. Her server needed replacement again. She could invest in new hardware and hope it lasted, or she could move to professional cloud infrastructure that eliminated the hardware headache entirely.

"We were at a point of looking at, do we keep our server going or do we move on and jump into something like you guys had for us."

For a firm handling **client financial data** for four decades, professional security mattered. "Just having a professional business, knowing that - **or trusting that our products are as safe as they can be**, our information—that's where Verito came in."

AT A GLANCE

FIRM SNAPSHOT

- **Name:** Anna Stevens
- **Industry:** Tax Services
- **Size:** 2-3 employees
- **Software:** QuickBooks, tax software

THE CHALLENGE

- After decades in tax preparation, Anna sought to modernize her firm to improve efficiency and reduce IT headaches.
- Her in-house server setup had become unreliable, with repeated hard drive failures, messy data restores, and no consistent IT support.
- Growing security concerns and the need for a stable, professional environment led her to explore Verito for a safer, more secure solution.

WHY VERITO

- Anna first learned about Verito at an NATP conference and took time to research before committing.
- When her server needed replacement again, she chose Verito over investing in new hardware to avoid ongoing maintenance and reliability issues.
- Verito's professional-grade security and cloud infrastructure gave her confidence that her firm's sensitive client data was safe and protected.

THE SWITCH

"I think it was pretty seamless."

The migration didn't stand out as troublesome. No drama, no extended downtime, no data loss. Just a smooth transition from in-house server to cloud infrastructure.

"It doesn't stand out as being troublesome. I'll say that."

THE RESULTS

Excellent. No complaints.

Anna's firm now operates without server hardware to maintain, hard drives to replace, or backup restoration nightmares to manage.

Support response is fast. **"Very, very responsive"** anytime we have a question. Our biggest thing is occasionally QuickBooks will need an update, and that's usually a quick email to support and it's taken care of very quickly."

The support team even handles the small stuff that keeps a practice running. When printer connections failed recently, "A quick email and then a call, and them logging in and helping us make that happen and fixing it so we can continue to use our equipment."

No more calling her kids for IT help. No more scrambling to find a local technician. No more hardware failures during tax season.

"I have no reason to look anywhere else."

THE BOTTOM LINE

After 40 years in business and multiple server disasters, Anna's firm finally has reliable, secure infrastructure they can trust without managing hardware themselves.

"I'm always recommending you because it's been great for us."

Want similar results? Learn how Verito eliminates server headaches and delivers secure, reliable infrastructure for tax professionals.

AT A GLANCE

THE SWITCH

- Anna's migration from her in-house server to Verito's cloud system was smooth and trouble-free.
- The transition was so seamless that it didn't even stand out as a challenging experience.

THE RESULTS

- With Verito, Anna's firm runs smoothly without the burden of maintaining servers, replacing hard drives, or managing backups.
- Support is fast and reliable handling everything from QuickBooks updates to printer connection issues with quick responses and remote fixes.
- Verito eliminated her reliance on family or local techs for IT help, giving her a worry-free, professionally managed setup.

