

CASE STUDY

Growing CPA Firm Gets Drake Hosting from a Team That Actually Understands Tax Software



FIRM SNAPSHOT



Ashley M. Moore

- **Firm:** Ashley M. Moore, CPA
- **Owner:** Ashley M. Moore
- **Firm Size:** Small firm, recently expanded from solo to multi-staff
- **Software:** Drake Tax, TaxDome, Adobe
- **Previous Setup:** Solo practitioner managing everything locally
- **Discovery Source:** Jason Staats community

THE CHALLENGE

Ashley Moore started as a solo CPA just her and her laptop. No need for fancy infrastructure when you're the only person touching the files.

Then she grew. She hired help. And suddenly, everything got complicated.

"When it was just me, I didn't obviously need Verito. And then I added some help. And then I also realized the need to be able to like if we go out of town, I'd like to just put a remote in."

Drake Tax isn't cloud-based. You can't just share a login and call it a day. She needed somewhere to host it so her team could access files from anywhere.

"It's not an online platform. It's not an online program. Drake isn't. So I need somewhere to host it. And I don't want to have a server."

She needed professional hosting that understood tax software not a generic IT company that would have to figure out Drake from scratch.

WHY VERITO

Ashley discovered Verito through **Jason Staats' community**, where accounting professionals share recommendations for vetted vendors.

What set Verito apart? **Tax software expertise.**

"The thing that's been most helpful, as opposed to maybe other people I could go with, is **y'all are already familiar with most of the programs I use.** You're not trying to figure out how do we install Drake. Like, **they already knew exactly what was needed.**"

She'd already learned that lesson the hard way with a local IT company handling device backups. "They don't do strictly accounting firms. And so there's a learning curve. You have to teach them what things do and what this software is & how these go together. **I don't want to do that.**"

THE SWITCH

"Super easy."

Ashley provided her Drake serial numbers. Verito's team handled everything else.

AT A GLANCE

FIRM SNAPSHOT

- **Name:** Ashley M. Moore
- **Software:** Drake Tax, TaxDome, Adobe
- **Size:** Small firm
- **Discovery Source:** Jason Staats community

THE CHALLENGE

- Ashley started as a solo CPA but realized she needed better infrastructure once she hired help and began working remotely.
- Since Drake Tax isn't cloud-based, she needed a secure hosting solution to give her team remote access without maintaining a physical server.
- She wanted a provider experienced with tax software like Drake one that could deliver professional hosting without the hassle of managing IT herself.

WHY VERITO

- Ashley found Verito through Jason Staats' accounting community, where peers recommended trusted technology vendors.
- She chose Verito for its deep familiarity with tax software like Drake, eliminating the setup confusion common with generic IT providers.

"I think I had to provide my serial numbers for Drake. That was about it."

They installed TaxDome, Adobe, and everything else she requested without her having to explain what any of it was or how it worked.

THE RESULTS

No complaints. The system just works.

When Drake wouldn't update last week probably because an employee was still logged in she emailed support. **"Within five minutes, it's updated, you're ready to go."**

When she adds new employees, Verito handles the onboarding. "Anytime I've added an employee, they've hopped on a call with them and been able to help them."

The support experience is so smooth that she's already reconsidering her local IT contract. "I did just go to an IT company for just backing up our computers. And **I already think I should have gone with y'all.** So once this contract ends, I might switch to that as well."

The difference? **No teaching required.** "I've been super happy with y'all. Good service."

THE BOTTOM LINE

Ashley grew from solo practitioner to multi-staff firm without the headache of managing servers or teaching IT vendors how tax software works.

"I've only got positive things to say."

Want similar results? Learn how Verito delivers Drake hosting with support teams that already know your software no explanations required.

AT A GLANCE

THE SWITCH

- The Verito setup process was effortless Ashley only needed to share her Drake serial numbers while the team handled the rest.
- Verito installed all her essential tools, including TaxDome and Adobe, without requiring her to explain or configure anything herself.

THE RESULTS

- Ashley's Verito system runs reliably when small issues like a Drake update arise, support resolves them within minutes.
- Verito's team seamlessly onboards new employees, handling setup calls and access without hassle.
- The responsive, knowledgeable support has impressed her so much that she's considering switching all her IT services to Verito once her local contract ends.