

CASE STUDY

Solo Practitioner Goes Fully Remote During COVID And Never Looked Back



FIRM SNAPSHOT

- **Firm:** Jayson Werra Tax Services
- **Owner:** Jayson Werra
- **Years in Business:** Since 2011
- **Staff:** Solo practitioner with virtual assistant year-round, seasonal contractor during tax season
- **Client Base:** 100% digital (except handful of family/friends)
- **Software:** Drake Tax (hosted), TaxDome portal
- **Previous Setup:** Drake on local laptop, contractor worked on-site
- **Discovery Source:** NATP
- **Current Services:** VeritSpace (Drake hosting) + VeritGuard (managed IT)

THE CHALLENGE

Jayson Werra started his tax practice from his home office in 2011. For years, Drake Tax lived on his laptop. It worked fine he was solo, mobile, and had everything he needed locally.

Then he hired help. His seasonal contractor started coming into the office during tax season to access Drake.

"The contractor was coming into my office. He is local to me. So I did that until **COVID set that to not do that anymore.**"

Suddenly, Jayson needed a way for multiple people to access the same Drake data from different locations. **Drake isn't cloud-based.** You can't just share a login.

He needed hosting but he also wanted to reclaim his time from IT management. "I wanted to try to **get some of my time and thought process back and not have to necessarily deal with that type of thing anymore.**"

WHY VERITO

Jayson discovered Verito through **NATP**, one of the tax professional associations he's involved with.

He explored two options: Verito and Right Networks (Drake's recommended partner). He chose Verito.

What made the difference? **Taking IT off his plate entirely.** "A lot of stuff is managed where I don't have to think about it. So that is the good part about it and kind of why another piece of why I explored this along with having someone else that was working remote is just to try to get some of my time back."

THE SWITCH

"I don't recall it being that big of a setup."

Jayson set up two-factor authentication, downloaded what he needed, and provided his Drake credentials. Verito's team handled the rest.

"I remember having the guidance to be able to do it, and having someone available to me if I needed to jump on a call. Very responsive with getting that done."

The migration was so smooth it's barely memorable which is exactly what you want from a major infrastructure change.

AT A GLANCE

FIRM SNAPSHOT

- **Name:** Jayson Werra
- **Industry:** Tax Preparation (NATP Member)
- **Size:** Solo Practitioner
- **Services:** VeritSpace (Drake hosting) + VeritGuard (managed IT)

THE CHALLENGE

- Jayson ran Drake Tax locally for years simple setup worked when he was solo and mobile.
- Hiring seasonal help created access problems, especially once COVID stopped in-office sharing.
- He turned to hosting to enable multi-user access and free himself from handling IT tasks.

WHY VERITO

- Jayson found Verito through NATP and compared it with Right Networks, Drake's recommended partner.
- He ultimately chose Verito over Right Networks.
- The key factor was fully offloading IT so he could save time and not think about tech management.

THE RESULTS

Fully remote operation. Jayson now runs his practice with a virtual assistant and seasonal remote contractor all accessing Drake seamlessly from different locations.

He's expanded beyond just hosting to **full managed IT with VeritGuard**, covering backups, firewalls, and **IRS-required WISP documentation**. "It's helpful to have all of that stuff to make sure that we have the right backup set in place and the right IT stuff that I don't do. I know some buzzwords like the firewalls and the WISP that I need for myself."

System reliability is solid. "I haven't had any issues. Maybe some login things occasionally. Not many outages or anything like that, no significant downtime."

Support response is fast. "If I do need to submit a ticket, I always get a response promptly. That would be **above and beyond versus other companies where you're waiting a couple hours or 24 hours** or whatever it is."

He's able to focus on tax strategy instead of IT troubleshooting. This year, he's implementing AI tools like Juno within TaxDome so his assistant can handle data entry while he focuses on complex returns and client strategy.

The whole experience is forgettable in the best way. "If I don't remember some of this stuff, it means **that's a good thing**."

THE BOTTOM LINE

Jayson went from managing Drake on a local laptop with an in-office contractor to running a **fully remote, digital-first practice** without becoming an IT person in the process.

"It's been great. Nothing stands out one way or the other which is also what I've come to expect and the reason that I signed on for it."

Want similar results? Learn how Verito enables solo practitioners to go fully remote without managing their own IT infrastructure.

AT A GLANCE

THE SWITCH

- Jayson said the setup was simple he just enabled 2FA, downloaded a few things, and shared Drake credentials.
- Verito guided him through the process and was available for support when needed.
- Migration was so smooth it felt effortless no disruption, no stress.

THE RESULTS

- Jayson now runs a fully remote firm with multiple users accessing Drake smoothly, and has upgraded to full managed IT including backups, firewalls, and WISP support.
- Reliability and support are strong minimal downtime and fast ticket responses compared to typical IT vendors.
- With IT off his mind, he's focused on tax strategy and AI-powered workflows instead of troubleshooting tech.