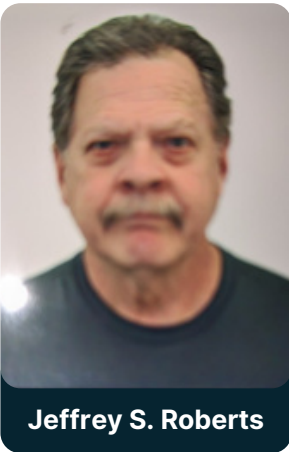


CASE STUDY

72-Year-Old Tax Pro Stops Worrying About Data Loss and IRS Security Requirements



FIRM SNAPSHOT



Jeffrey S. Roberts

- **Firm:** Jeffrey S. Roberts Tax & Accounting
- **Owner:** Jeffrey S. Roberts
- **Years in Business:** 40+ years
- **Staff:** Solo practitioner working from home
- **Services:** 50/50 split between tax prep and small business accounting (quarterly payrolls, P&Ls, bookkeeping)
- **Software:** ProSeries Tax, QuickBooks Online, Excel
- **Previous Setup:** Local desktop with manual backups to external hard drive and thumb drives
- **Years with Verito:** Nearly 2 years
- **Discovery Source:** Client referral + tax pro online board

THE CHALLENGE

Jeffrey Roberts has been doing taxes for over 40 years. At 72, he's still busy quarterly payrolls, bookkeeping clients, tax returns but he's slowing down a bit.

For years, he managed everything himself. One-man band. One-man IT department too.

His backup system? A Passport hard drive. A thumb drive thrown in his truck occasionally. "When you're working at home, if your backup's in your home and everything burns down, you're screwed. So I'd throw a thumb drive in the truck once in a while."

Then **QuickBooks screwed up**. Tech support told him to reinstall Windows. He backed everything up or so he thought.

"When I was done, **all of my tax files were gone**."

The horror was immediate. "You can't really rebuild depreciation schedules that go back for 20 and 30 years on some of these guys."

He was terrified for weeks until he found an old thumb drive in his truck with files from May of that tax season. "Fortunately, I was only missing a few as it turned out. But I was just absolutely terrified there for a good couple of weeks."

That close call stuck with him.

Meanwhile, **the IRS kept piling on security requirements**. "The IRS was putting the heat on for us to protect data. The world had just gone so frickin' crazy in terms of attacks. And they love to come after the accountants because **we've got the lists, man. You've got everybody's social security numbers, mother's maiden names, date of birth the whole shot**."

He knew he needed professional infrastructure. But how do you even find it?

WHY VERITO

Jeffrey's search started with Intuit, who offered a remote backup solution through a partner. "Let's say it's **twice as expensive as you guys**."

He looked at other options. Amazon's site used terms he didn't understand. Nothing felt right.

Then an IT client started digging around for him. "He says, 'You might like this one because I think **they're just built for accountants and tax folks**.' And I'm like, really?"

He found confirmation on his tax pro board other solo practitioners recommending Verito. "I'm on a tax board with other tax pros, and they were all saying the same thing. Somebody mentioned Verito, so I was getting confirmation a couple of different places."

AT A GLANCE

FIRM SNAPSHOT

- **Name:** Jeffrey S. Roberts
- **Industry:** Tax & Accounting
- **Size:** Solo Practitioner
- **Services:** Tax prep and small business accounting

THE CHALLENGE

- After decades of managing his own IT with basic backups, Jeffrey nearly lost decades of client data when a reinstall wiped his tax files saved only by an old thumb drive in his truck.
- The experience, combined with increasing IRS data security requirements, made him realize his DIY setup was no longer sustainable.
- He recognized the need for professional, secure IT infrastructure to protect sensitive client information and meet modern compliance standards.

WHY VERITO

- Jeffrey explored several backup and hosting options, including Intuit's partner solution, but found them too expensive or overly technical.
- Recommendations from fellow tax pros on his online forum reinforced his decision multiple sources confirmed Verito as a trusted choice.

THE SWITCH

"A whole lot better and easier than I thought it would be."

Jeffrey was nervous about the migration. Setup processes can be laborious. Would he have to hunt down files himself? Learn new systems?

"The guy just grabbed this baby completely and took it all over, made it all work. 'How many years of ProSeries do you want on there?' I'm like, 'Let's do three or four.' Okay, boom, boom, boom they're all on there. **It was just really, really seamless.**"

The technician went into Jeffrey's computer, found the files, and moved everything over. "I was concerned about, you know, where do I have to go find the files and I got to move them. He's like, 'No, no, no. Just tell me where you think it is.' And he's going into the computer and grabbing the stuff and moving them all over. Yeah, **it was as seamless as it can get.**"

THE RESULTS

No more thumb drives in the truck. No more terror about data loss.

"It's nice not having to worry about it anymore. Nobody has to screw up my computer. They're not going to do anything and they can't break in. **So the security side of it is huge.**"

Jeffrey now meets **IRS security requirements** without managing it himself. "The IRS is putting a lot of stuff on us to make sure that we protect client data. And so **I don't have to worry about it now. It's all done.**"

The system has geographic redundancy something that gave him extra peace of mind when one data center flooded. "Fortunately, you do two locations because one of them probably got flooded out about a year ago. And I'm like, 'Oh, I'm glad they've got two locations to back stuff up.'"

His PDFs are instantly accessible. Recently, he needed to calculate cost basis on dividend reinvestments going back to 2017. "Oh, lo and behold, **all my PDFs are right there.** It's like ding, ding, ding, ding through them without having to open up the software."

Support has been responsive whenever small issues arise. "Every time there was any kind of a little issue, **it was resolved very, very quickly and easily.**"

AT A GLANCE

THE SWITCH

- Jeffrey expected a difficult migration but was pleasantly surprised by how simple and smooth it was.
- The Verito technician handled the entire process locating and transferring multiple years of ProSeries data without Jeffrey needing to intervene.
- The setup was completely seamless and far easier than Jeffrey imagined, leaving him impressed with the support experience.

THE RESULTS

- Jeffrey no longer worries about data loss or security Verito's managed, redundant system keeps his files safe and IRS-compliant without him lifting a finger.
- Geographic redundancy and instant PDF access give him peace of mind and efficiency, even when a data center issue occurred.
- Verito's responsive, friendly support especially the Indian team has impressed him so much that he now recommends the service to fellow solo tax practitioners.

The Indian support team exceeded his expectations. "It gave me pause when I first saw it, like, 'Oh.' But geez. **These guys have been so warm, helpful, smart. I mean, my gosh, I couldn't ask for anything better.**"

He's recommending Verito to other solo practitioners on his tax board. "Most of the people on this tax board are smaller operators. That's why we need a board if we don't have somebody else to talk to, you don't get to chum up to your buddy in the office. But yeah, **I'll put a little note up on there to remind them this is the best. No doubt about it.**"

THE BOTTOM LINE

Jeffrey went from terrifying data loss scares and manual thumb drive backups to **secure, professionally managed infrastructure that meets IRS requirements** without becoming an IT expert at 72.

"I couldn't be more pleased. Just total joy in having all that stuff automatically backed up. It's nice not having to worry about it anymore."

Want similar results? Learn how Verito helps solo practitioners secure client data and meet IRS security requirements without the IT headaches.

AT A GLANCE

THE BOTTOM LINE

- At 72, Jeffrey transitioned from risky, manual backups to a secure, professionally managed system that fully meets IRS data security requirements.
- He now enjoys total peace of mind knowing his data is automatically backed up and protected without any technical hassle.
- Verito enables solo practitioners like Jeffrey to stay compliant and secure without needing to be IT experts.