

CASE STUDY

Solo Practitioner Escapes Office Chaos and Builds Practice on Her Own Terms



FIRM SNAPSHOT



June Lincoln

- **Firm:** June Lincoln Tax Services
- **Owner:** June Lincoln
- **Years in Business:** 17+ years (solo practice for 5-6 years)
- **Staff:** Solo practitioner (husband provides seasonal verification during tax season)
- **Software:** Drake Tax
- **Previous Setup:** Drake's basic portal system, insecure office IT infrastructure
- **Discovery Source:** IRS tax conference
- **Current Use:** Flexible seasonal access for husband, remote work while traveling

THE CHALLENGE

June Lincoln worked at a multi-location tax firm where the IT setup was a disaster.

"It was a hodgepodge of things and **it wasn't secure** and it was just - **it was a mess.**"

When she went out on her own five or six years ago, she knew exactly what she didn't want: the chaos she'd left behind. But she also knew what she needed: autonomy, efficiency, and security.

"When I first went out on my own, it's like, **oh my gosh, what am I doing? Am I going to be able to do this?** I was trying to have more autonomy to do things on my own and be able to do them efficiently and effectively."

She started with Drake Tax's basic portal system. "I wasn't very happy with that."

As a self-described non-tech person, she needed something that just worked without requiring her to become an IT expert. "I am strictly an end user. **I don't know anything about technology or anything else like that.**"

She also needed flexibility. Her husband helps verify returns during tax season, so she needed to add users temporarily without long-term commitments.

WHY VERITO

June discovered Verito at an **IRS tax conference**. "I saw Verito and liked what I saw there and the monthly price was reasonable."

Drake may have recommended Verito as an option. Other providers were there too, but June trusted her gut. "Yours was recommended. I just went with that and **have been happy ever since.**"

What sold her? **Flexibility.** "I like the versatility of Verito just using it when I needed it."

THE SWITCH

"**Very easy** from what I remember."

June did a trial period, liked it, and went all in. The setup was straightforward enough that she barely remembers the details which is exactly what you want from a migration.

AT A GLANCE

FIRM SNAPSHOT

- **Name:** June Lincoln
- **Industry:** Tax Preparation
- **Size:** Solo Practitioner
- **Services:** Flexible seasonal access for husband, remote work while traveling

THE CHALLENGE

- June left a chaotic, insecure IT setup at a multi-location tax firm and wanted autonomy, efficiency, and security in her own practice.
- As a non-technical user, she needed a system that was simple, reliable, and didn't require IT expertise.
- She needed flexible access like adding her husband as a temporary user during tax season.

WHY VERITO

- June first discovered Verito at an IRS tax conference and was attracted by its reasonable monthly pricing.
- Although multiple providers were present, she chose Verito partly due to a Drake recommendation and her own positive impression.
- Flexibility was the key selling point; she appreciated being able to use Verito only when she needed it.

THE RESULTS

Complete autonomy with professional infrastructure. June built her practice entirely through word-of-mouth referrals no advertising needed while maintaining the security and flexibility a solo practice requires.

Her husband joins during tax season to verify returns before filing. Adding and removing his access is simple. "I have him online with us to do the back check for me before I send returns out."

Work-life balance finally works. June travels extensively with her daughter's national softball team. "Literally over the summer, I was gone for two months. So having the ability to **pick up my computer, take it with me, and work anywhere was a big help.**"

She can disconnect when she wants and reconnect from anywhere when she needs to. "Just knowing that I can get on anywhere when I needed it and knowing **it's secure and it's taken care of is a big weight off my shoulders.**"

Support handles the technical problems she can't. When a recent OS update broke her signature pad connection, the team walked her through the fix. "There was no way that I was going to get it fixed with all the adaptations and manipulations. So **just knowing what they know to do and get it done, I don't have to worry about it.**"

Even when support explains how to fix something herself, she's honest: "He basically told me, 'If this ever happens again, you can try to do this.' But I was like, 'Yeah, no, I'm probably going to call in and let you do it.'"

No complaints whatsoever. "This has been a godsend. It's been very good. This has definitely helped make that happen being able to do things efficiently and effectively on my own."

THE BOTTOM LINE

June escaped a chaotic multi-location firm and built a thriving solo practice on her own terms with professional IT infrastructure she doesn't have to manage herself.

"I've been extremely happy. No complaints whatsoever."

Want similar results? Learn how Verito gives solo practitioners the security and flexibility to work anywhere without becoming IT experts.

AT A GLANCE

THE SWITCH

- June started with a trial period, was satisfied, and decided to fully commit to Verito.
- The setup and migration process were so smooth that she barely remembers the details.
- The ease of onboarding reinforced her confidence that Verito was the right choice.

THE RESULTS

- Verito gives June complete autonomy and flexibility she runs her secure solo practice entirely through referrals and can work seamlessly from anywhere, even while traveling.
- Managing seasonal help is effortless; she easily adds or removes her husband's access during tax season.
- Reliable support handles any technical issues, letting her stay focused on her work June calls Verito "a godsend" for enabling efficiency and peace of mind.