

CASE STUDY

Solo Practitioner Protects Her PTIN and Stays Compliant Without Hiring IT Staff



FIRM SNAPSHOT



Melendi Morton

- **Firm:** MPM Business Solutions
- **Owner:** Melendi Morton
- **Services:** Strategy & operations consulting, bookkeeping, tax preparation
- **Previous Setup:** Self-managed laptop with basic safeguards
- **Software:** Drake Tax

THE CHALLENGE

Melendi Morton ran MPM Business Solutions the old-school way everything on her laptop, managing her own IT, hoping nothing would go wrong.

"I was back in the 1900s," she laughs. "I had a laptop, some standard blockers, and Gmail doing some safeguarding. That was it."

As a solo practitioner with an information systems background, she'd avoided major disasters. But **IRS regulations changed everything**. The Written Information Security Plan requirement wasn't optional anymore. She needed a compliant setup to protect her PTIN and keep filing returns.

"There was a requirement you got to have something. You need a secured site. You need a **WISP in place**. All of those things were part of what I needed to continue running the tax portion of my business."

Without proper compliance, she couldn't file. And as the sole IT person for her firm, she was one hardware failure or security incident away from losing everything.

WHY VERITO

Melendi discovered Verito at an NATP tax symposium, where **IRS compliance requirements** were front and center.

"It was heavily promoted as one of the solutions I could bring on. NATP had a good partnership, and I was able to get connected through that."

She needed more than just cloud hosting she needed a provider that understood tax preparers' compliance obligations and could deliver a **fully compliant environment** without requiring her to become an IT expert.

THE SWITCH

"It was actually great. It was seamless."

Melendi got clear instructions, uploaded her data quickly, and had support available throughout the process.

"Once I signed up, I got good instructions. The import of the data was very good. The person I was working with was very helpful. I didn't have any problems."

AT A GLANCE

FIRM SNAPSHOT

- **Name:** Melendi Morton
- **Industry:** MPM Business Solutions
- **Services:** Strategy & operations consulting, bookkeeping, tax preparation

THE CHALLENGE

- Melendi managed her solo tax practice entirely on her laptop with minimal protection relying on basic blockers and Gmail for security.
- New IRS requirements, including the Written Information Security Plan (WISP), forced her to upgrade to a compliant, secure setup to keep her PTIN active and continue filing returns.
- As her own IT person, she realized she was vulnerable one hardware failure or security breach could jeopardize her entire business.

WHY VERITO

- Melendi first learned about Verito at an NATP tax symposium focused on IRS compliance requirements.
- Verito was promoted through NATP's partnership as a trusted, compliant solution for tax professionals.

THE RESULTS

Now IRS compliant. Melendi's firm meets **IRS Publication 4557 requirements**, with a documented WISP and secure infrastructure protecting her PTIN.

"When you have something that's running and working for you, if nothing's happening, that's a good thing. I'm able to log in, get in, it works, all my stuff is there for me, that's all I need."

The few times she's needed support, response was immediate. "There was an issue where I couldn't log in for some reason. **It was fixed within an hour** and I was back up and running."

Unlike the healthcare systems she deals with in her consulting work, Verito just works. "It is not as easy to get into some of the remote systems I have to work with as it is for me to get into my own system."

She's already recommending Verito to potential clients. "I went to a retreat a few weeks ago and met some clients looking for ways to have a more secure way to manage data. I had you on my mind to recommend here's a good way to safeguard the information."

THE BOTTOM LINE

Melendi went from managing everything herself on a laptop to running a **fully IRS-compliant** operation with professional-grade security without hiring IT staff or worrying about hardware failures.

"I couldn't be happier. It just works."

Want similar results? Learn how Verito helps solo practitioners stay compliant and protected without the complexity.

AT A GLANCE

THE SWITCH

- Melendi described her Verito onboarding experience as seamless and smooth.
- She received clear setup instructions and was able to upload her data quickly without issues.
- Support was responsive and helpful throughout the process, making the transition effortless.

THE RESULTS

- Melendi's firm is now fully IRS compliant, with a secure WISP-backed infrastructure protecting her PTIN and client data.
- Verito provides reliable, hassle-free access any rare login issues are resolved quickly by responsive support.
- She's impressed by Verito's simplicity and reliability and now recommends it to other professionals seeking secure data management solutions.