CASE STUDY

How a Sole Practitioner Tax Preparer Eliminated Downtime Anxiety and Achieved WISP Compliance with Verito Managed IT

FIRM SNAPSHOT

- **Name:** Nick Vitullo
- **Industry:** Tax Preparation (NATP Member)
- **Size:** Sole Practitioner
- **Services:** Verito Managed IT, WISP (Written Information Security Plan) Implementation, Datto Disaster Recovery

BACKGROUND

Nick Vitullo, a sole practitioner tax preparer, was struggling with the unreliability and stress of a reactive, local IT provider. Downtime caused panic, especially during peak tax season, and the mandatory requirement for an IRS Written Information Security Plan (WISP) was a daunting task he had avoided. After discovering Verito through an NATP webinar, Nick engaged their Managed IT services. The switch provided him with immediate, personalized support, proactive system maintenance, advanced disaster recovery, and effortless compliance, transforming his IT experience from a liability to an asset.

THE CHALLENGE

Before partnering with Verito, Nick Vitullo's IT strategy was entirely reactive. He relied on a local technician paid on an hourly basis ($90/hour) when things broke. This model proved stressful, inefficient, and unreliable.

"I had a local IT guy that would help me out, but he was not always available," Nick recalled. "Sometimes something would freeze up and... I was panicking."

In addition to the stress of unreliable support, Nick faced a significant compliance hurdle. As a tax professional, he is required by the IRS to maintain a WISP. Despite knowing the requirement, the implementation seemed overwhelming. "It just seemed like a lot of work for me to do."

Nick needed a partner who could not only fix issues instantly but also proactively manage his technology and handle his compliance requirements.

SOLUTION

Nick's search for a WISP solution led him to a webinar hosted by Verito for the NATP. The realization that Verito could handle the WISP implementation was the catalyst for the partnership.

"I never had a WISP plan done," Nick explained. "When I went to the webinar... I was very interested in that, and that's what caused me to start this whole deal with you guys. And then it's blossomed into the managed IT stuff."

Verito onboarded Nick with a comprehensive Managed IT package, which included WISP creation and maintenance, proactive security monitoring, full-disk image backups (Datto), and access to a dedicated support team.

AT A GLANCE

THE CHALLENGE

- Hourly-bill IT ($90/hr) with inconsistent availability

- Freezes/outages created panic during peak filing

- WISP requirement looming with no time to implement

"Sometimes something would freeze up and... I was panicking."

SOLUTION

- **WISP** created and maintained; annual review

- **Proactive care:** monitoring, patching, endpoint protection, biannual tune-ups

- **BCDR:** Datto creates complete copies of your entire system, so if your system fails, we can bring it back exactly as it was quickly and reliably.

THE RESULTS

The transition to Verito brought Nick's practice immediate relief and measurable value, thanks to responsive support and a strong personal connection with the team.

Personalized and Instant Support
Nick quickly built a trusted relationship with Verito's dedicated support team. "Verito was the first company I spoke to, and they've been great with response and everything else from day one," he shared. The stress of IT issues is gone: "When I have a problem, I just call Verito. Nine times out of ten, they answer right away or call me back within 30 minutes. That works out great."

A Clear Return on Investment
Switching from hourly IT charges to Verito's fixed-fee managed service has proven to be a financial win. Compared to his previous provider's $90/hour rate, Nick sees clear savings.

"I probably do a lot better with Verito than $90 an hour for all the time I spend with them. It's a bargain—I'm definitely getting my money's worth," he noted.

Proactive Care and "Unbelievable" Disaster Recovery
Verito focuses on prevention, providing a biannual "tune-up" that has already caught and fixed potential issues. One of the biggest upgrades has been Datto full-disk image backups, ensuring both data and system configurations are safe.
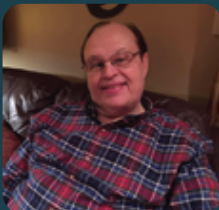
"The Datto backup is incredible—I never knew something like that existed. If my computer completely crashed, Verito could rebuild it instantly with all my programs and data. That's unbelievable."

- **Support:** one named technician, responsive and consistent

RESULTS

- **Responsiveness:** "90/100 times answered live or called back <30 min."

- **Peace of mind:** "The panic is gone I just call Verito."

- **Value:** "A bargain vs $90/hr I'm getting my money's worth."

- **Resilience:** "If I crashed, I could be regenerated on a new computer in an instant."

"I put the word out there that how great you guys are to other people."

Nick Vitullo E.A.

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It just works. Securely.

AICPA SOC 2

ISO 27001 Certified

Microsoft Partner

vmware PARTNER

Why Choose Verito for Managed IT

24/7/365 Best Technical Support: Our certified professionals are available 24/7/365 for any support needs. 100% customer satisfaction is our number one goal.

Advanced Ransomware Protection: Multi-layered defense system with real-time threat detection, behavioral analysis, and automated isolation protocols to prevent ransomware attacks that could hold your clients' financial data hostage.

Intelligent Patch Management: Automated, non-disruptive patch deployment across all endpoints during off-hours. Critical security updates are prioritized to protect against zero-day vulnerabilities without interrupting tax season workflows.

Remote Workforce Security: Secure your distributed team with encrypted VPN connections, device compliance checks, and conditional access policies. Enable secure work-from-home without compromising client data protection.

Automated Backup & Recovery: Continuous data protection with hourly snapshots and point-in time recovery. Isolated backup storage prevents ransomware from encrypting backup files, ensuring business continuity even during attacks.

Daily Automated Backups: Our automated enterprise-grade daily backups ensure peace of mind. Never worry about data loss again.

Tax Season Scalability: Dynamically scale security resources during peak periods without performance degradation. Handle increased workloads during busy season while maintaining the same security posture.

Real-Time Threat Intelligence: Leverage AI-powered threat detection that learns from millions of endpoints globally. Proactive defense against emerging threats specific to financial services and accounting firms.

Professional Liability Protection: Demonstrate due diligence with comprehensive security measures that can reduce E&O insurance premiums and protect against negligence claims in case of data breaches.

Device Health Monitoring: Proactive monitoring of hardware health, disk encryption status, and security posture. Prevent data loss from failing drives and ensure all devices meet security baselines.

Deadline-Driven Performance: Intelligent resource allocation that prioritizes security processing based on filing deadlines and engagement timelines.