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## Sole Prac Offers Up Tax Workflow and Practice Management Product

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SEPTEMBER 18, 2013  
 BY SETH FINEBERG

New York-based sole practitioner Jonathan Medows of **Medows CPA** has created TaxWorkFlow, his own tax workflow and practice management system, which he is now offering up to other small CPA firms for beta testing.

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Medows launched his practice back in 2004 while studying to be a rabbi and as his practice grew to a staff of five (including himself) -- 10 during tax time -- he found that spreadsheets were inadequate as he wasn't always able to update them regularly or accurately keep track of what he needed. More importantly, Medows discovered that

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available workflow and practice management tools were either too costly or didn't quite work the way he needed them to for his practice; so he and developer friends created TaxWorkflow.

After a few years of his own testing and use of the product, Medows is now offering TaxWorkflow to other CPA firms to beta test it – though there is not yet any set pricing and “still some work to be done” on the product.



“At its core was managing tax prep workflow for a volume-based firm, so I had key tasks automated that allowed me to keep track of where everything was without constantly updating spreadsheets and I can assign work based on [staff] workload,” said Medows. “We also have a CRM component built in, it’s integrated to Outlook, there’s a client portal and an online calendar. We can also capture email back and forth to clients and the workflow is connected to our tax software so we can publish documents right to a client folder.”

Medows noted that TaxFlow also helps his firm with workflow processes for his client accounting work and is building an integration for QuickBooks.

“I’m not saying this is the best thing out there,” he added. “For small practitioners you should look around because it’s an investment if you are serious about growing your business, but this is something that is working for us and we’re growing fast.”

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Thanks for your inquiries. Please visit our site [www.medowscpa.com](http://www.medowscpa.com) and use the contact form to provide information where we can respond to you.

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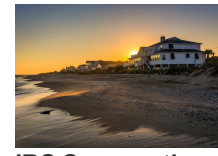
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I have been using a system I developed for myself. It is geared to the non-income tax portion of my business. Unfortunately, it is cumbersome. I agree that available systems are either costly or don't work and would welcome the opportunity to evaluate your system.

Posted by: btsuperman | September 18, 2013 2:44 PM

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