

CASE STUDY

Growing CPA Firm Gets Drake Hosting from a Team That Actually Understands Tax Software



FIRM SNAPSHOT



- **Firm:** Ashley M. Moore, CPA
- **Owner:** Ashley M. Moore
- **Firm Size:** Small firm, recently expanded from solo to multi-staff
- **Software:** Drake Tax, TaxDome, Adobe
- **Previous Setup:** Solo practitioner managing everything locally
- **Discovery Source:** Jason Staats community

THE CHALLENGE

Ashley Moore started as a solo CPA just her and her laptop. No need for fancy infrastructure when you're the only person touching the files.

Then she grew. She hired help. And suddenly, everything got complicated.

"When it was just me, I didn't obviously need Verito. And then I added some help. And then I also realized the need to be able to like if we go out of town, I'd like to just put a remote in."

Drake Tax isn't cloud-based. You can't just share a login and call it a day. She needed somewhere to host it so her team could access files from anywhere.

"It's not an online platform. It's not an online program. Drake isn't. So I need somewhere to host it. And I don't want to have a server."

She needed professional hosting that understood tax software not a generic IT company that would have to figure out Drake from scratch.

WHY VERITO

Ashley discovered Verito through **Jason Staats' community**, where accounting professionals share recommendations for vetted vendors.

What set Verito apart? **Tax software expertise.**

"The thing that's been most helpful, as opposed to maybe other people I could go with, is **y'all are already familiar with most of the programs I use.** You're not trying to figure out how do we install Drake. Like, **they already knew exactly what was needed.**"

She'd already learned that lesson the hard way with a local IT company handling device backups. "They don't do strictly accounting firms. And so there's a learning curve. You have to teach them what things do and what this software is & how these go together. **I don't want to do that.**"

THE SWITCH

"Super easy."

Ashley provided her Drake serial numbers. Verito's team handled everything else.

AT A GLANCE

THE CHALLENGE

- Growth created the need for shared remote access to Drake Tax.
- Drake isn't cloud-based, and she didn't want to manage a server.
- Needed hosting that understands tax software, not generic IT.

WHY VERITO

- Found Verito through Jason Staats' accounting community recommendations.
- Chose Verito for deep tax software expertise, especially Drake.
- Avoids wasting time teaching generic IT how accounting software works.

"I think I had to provide my serial numbers for Drake. That was about it."

They installed TaxDome, Adobe, and everything else she requested without her having to explain what any of it was or how it worked.

THE RESULTS

No complaints. The system just works.

When Drake wouldn't update last week probably because an employee was still logged in she emailed support. **"Within five minutes, it's updated, you're ready to go."**

When she adds new employees, Verito handles the onboarding. "Anytime I've added an employee, they've hopped on a call with them and been able to help them."

The support experience is so smooth that she's already reconsidering her local IT contract. "I did just go to an IT company for just backing up our computers. And **I already think I should have gone with y'all.** So once this contract ends, I might switch to that as well."

The difference? **No teaching required.** "I've been super happy with y'all. Good service."

THE BOTTOM LINE

Ashley grew from solo practitioner to multi-staff firm without the headache of managing servers or teaching IT vendors how tax software works.

"I've only got positive things to say."

Want similar results? Learn how Verito delivers Drake hosting with support teams that already know your software no explanations required.

AT A GLANCE

THE SWITCH

- Setup process was extremely simple for Ashley.
- Only needed to provide Drake serial numbers.
- Verito installed all requested software without guidance.

THE RESULTS

- System works reliably with fast support (issues resolved in ~5 minutes).
- Verito handles employee onboarding seamlessly.
- Smooth support experience makes local IT contract less necessary.