



# Maximizing value: How ADP® helped an accounting firm enhance their advisory game

**David Dvorak**  
Owner

## Quick facts



**Company:** NorthStar  
Tax and Advice



**Headquarters:** Tampa, FL



**Industry:** Professional Services



**Employees:** 5



**ADP products:** RUN Powered  
by ADP®, Accountant Connect

Based in Tampa, Florida, David Dvorak has been running his accounting practice, NorthStar Tax and Advice, since 2011. His services differ from those of a typical accounting firm in that instead of just filing taxes, he fulfills a more personal advisory role with his clients, advising them on how they can spend less time and money on taxes and predictably increase their profits.

## Business challenges

- Getting new accounting clients on payroll required a complicated process
- Managing payroll for clients on multiple platforms was extremely time-intensive
- Errors with tax filing and remittance came up frequently
- Setting up S Corporation clients was never straightforward

**Partnering with RUN Powered by ADP® has enabled David to better serve his clients through support from his payroll representative, who helps implement payroll for David's new S Corp clients. The Accountant Connect platform within ADP gives him easy access to his clients' information, allowing him to support them through increased efficiencies in running payrolls and managing tax remittances all in one place.**

## Transforming S Corp set up with ADP

Before becoming an ADP client — and setting up a large portion of his clients on ADP — David was accustomed to a lengthy and involved process when it came to payroll and tax remittance. One key aspect of David's services is the guidance he provides business owners on the most advantageous way to move their business forward. Depending on the entity, this often involves converting clients from an LLC or Sole Proprietorship to an S Corp. Because an S Corp is a unique setup that requires payroll and specific tax remittance, getting the payroll in place is a key step. Most business owners don't know the legal tax requirements or benefits of having an S Corp, which is where David's expertise and the partnership with ADP come in. Without that expertise, many of his clients could miss out on significant tax savings and face compliance issues that could hinder their business growth. "Until I found ADP, I had not come across a good solution for accountants to administer their clients' payroll. I work with my ADP representative to have my clients set up — I call her, and then she reaches out and sets them up on payroll. Before ADP, I had to go through so many different steps to get my S Corps clients on payroll."



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The ease of working with his representative to process a new client on payroll has transformed what David can do for his clients. Instead of spending hours on implementation, he's freed up to do more strategic work. "Now I offer service to my clients in conjunction with tax preparation and bookkeeping," says David. Instead of configuring new clients, David can focus on the more important work of partnering with his clients to help them strategize growth for their businesses and manage tax planning.

### **Making taxes simple and saving time**

Most of David's S Corp clients run quarterly payrolls for just the owners. Between preparing payroll tax returns, making payments, and calling clients to ensure accuracy, it took about a week to run payroll for his clients. Now that many of his clients are on ADP and he's able to use Accountant Connect, David's whole process is different. "I schedule a quick meeting with each client, make sure we're on the same page, and then I run the payroll," says David. "It takes me about 30 minutes per client, and I'm running more payrolls than ever before."

Not only has RUN Powered by ADP improved running payroll and establishing his S Corp clients' payroll, it's also automated processes in other areas of David's business. Because ADP syncs with Quickbooks Online, a cloud-based accounting software, David no longer spends time importing payroll amounts or payroll taxes. "We offer bookkeeping services to many of our clients, so having data automatically exported into QuickBooks for every payroll saves us a lot of manual entry."

### **Top-notch customer care and accuracy**

A key difference David has noticed with ADP is that the customer service is more personal than other platforms he's used in the past. "Whenever I have any issue, the ADP representatives are great," he says. "If the representative I'm speaking with doesn't know the answer to my question, they just contact the next person up the line." David can't think of a time when he had an issue that couldn't be resolved quickly. "You're never left wondering what's happening or whether you will get helped. It always gets resolved."

David has come to rely on the accuracy of ADP's processing over the past two years. Instead of micromanaging tax remittance for his clients and their S Corps, he can rely on ADP to remit the proper taxes based on the clients' setup and the state they're located in. "It feels like it's too good to be true, to be honest," David says. "I'm going on two years now, and every quarter, it works smoothly, and all the taxes are remitted properly."

### **Compliance is easy with ADP, no matter the state**

While most of David's clients are based in the Tampa Bay area, he has clients in multiple states across the U.S. While this used to be a headache when setting up new clients depending on the tax laws in their specific jurisdictions, it's no longer something David worries about with ADP. "ADP knows state laws required by the state and local authorities across the country, and they file the payroll taxes according to the client's location, which keeps my clients in compliance."

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Now that ADP is responsible for state, city and local tax requirements, it's a huge burden lifted off David's plate. "If I pick up a client in another part of the country, ADP knows exactly where they need to register and what we need to have on file, which is not something you're going to get with your average local payroll service." David has confidence that ADP will file correctly and on time for his clients. "I don't even worry about it because so far, in all the time I've been with ADP, they've never filed something late or incorrectly."

### Looking to future growth with confidence

The established partnership with ADP has David feeling optimistic about the future of his business and his clients' businesses. With a combination of easy setups for his S Corp clients, best-in-class customer service and accurate tax withholdings enhancing David's operational efficiencies, he gets to focus on the unique offerings he can bring to his clients. "The advice I bring to my clients is really where the value is, and because ADP has been able to simplify the setups and the withholdings for me, I can help my clients plan their businesses effectively."

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