



Mikogo for Accountancy: Delivering key information without the confusion

Commonly known as the people who look after your tax filing, Certified Professional Accountants (CPAs) — the statutory title of qualified accountants in the U.S. — are increasingly seen as more than the numbers people. With their education and experience, CPAs are experienced advisors and business strategists, with many accounting firms providing one-stop convenience for all their clients' financial needs.

"We are problem solvers and teachers," said Tim FitzGerald, CPA and president of FitzGerald & FitzGerald. "We help our clients with accounting needs, but we also have to show them quick fixes when they have problems."

Paul Knott, CPA and managing partner of Knott & McNutt, CPAs, agrees. "Our clients rely on us for advice and guidance about their investments, savings and taxes," he explained. "When they need help, Mikogo enables us to provide a quick response."

When It's Easier To Show Than Tell

FitzGerald & FitzGerald helps small business owners make more proactive decisions by providing relevant advice. "Our clients know their business best, but we can help with structure, accountability and information."



"We are not cutting edge, technology wise, but we are not laggards... it has to be easy to use for us and for our clients. Mikogo meets both of those requirements."

- TIM FITZGERALD CPA AND PRESIDENT, FITZGERALD & FITZGERALD

A key product for the company is its proprietary Life Success System, a "comprehensive program that focuses on the client's whole situation, not just taxes," explained FitzGerald. "Taxes are part of the puzzle, but not the most important piece. What matters is helping a business grow or helping a client set their personal finances."

"We look at everything from the client's viewpoint," he said. "If a system or tool isn't easy for us to use, or if it doesn't help make their life easier, we need to rethink it. Mikogo is



simple to use for both us and our clients.”

FitzGerald notes that the Life Success System is complex by nature, and hard to explain. “However, there’s a simplicity to it that’s easy to see. Mikogo helps me show how straightforward it is and takes a little mystery out of the process.”

With big plans to license his company’s Life Success System to other CPAs, FitzGerald says he’ll rely on Mikogo even more for the sales process. “It streamlines the whole process, and I know it will be an integral sales tool.”

Timely Service Without The Travel Time

Knott & McNutt, CPAs, is known for the quality of its service; finances can be complex and confusing, and Paul Knott is committed to bringing clarity to his clients.

“We’ve been using Mikogo for about a year, and appreciate how quickly it lets us respond to our clients,” Knott said. “Approximately 1 in 10 clients are out-of-state, and we can’t always meet in person. Mikogo removes that distance so we can still deliver close personal attention to their needs.”



“Face-to-face meetings are ideal, but when that’s not an option, we know we have a high-quality tool that meets the expectations our clients have for a high level of service.”

- PAUL KNOTT, CPA AND MANAGING PARTNER. KNOTT & MCNUTT, CPAS

“For example, our clients often ask how to properly record transactions,” he explained. “Having the ability to show the proper steps, right on their screen, is much more effective than simply discussing it with them.”

Knott adds that one of the firm’s core principles is responsiveness. “Mikogo allows us to provide service right away without unnecessary travel time. Time is a scarce resource, and Mikogo allows us to be more effective in educating our clients.”



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