



Case Study Accounting and Tax Matters

Overview

Based in the regional Queensland town of Hervey Bay, Accounting and Tax Matters provides support to individuals, small-to-medium enterprises and self-managed super funds.

The firm has steadily been adding SMSF clients to the Mcloud platform, and Principal Julie Morrison has in the process gradually built up her confidence with the software.



“*Speaking of her Mcloud journey Julie had this to say:*

“I have been migrating clients as my time permits. While the Knowledge Base provides a useful reference source, I have also been in regular contact with the Support Team, and their assistance has been critical to my success with Mcloud.

The Team have always been very responsive, including when that response has required them to engage with the Development Team in relation to new features or bug fixes.”

We are not a particularly large firm, and being able to work with a like-minded technology partner is a perfect fit for us. I look forward to the planned improvements to editability and automation, which will make it even easier to manage our growing client base.”