



Tracey Dodd, Tax Senior, PKF Francis Clark

The accuracy and reliability of Digita Personal Tax software praised by award-winning firm PKF Francis Clark



PKF Francis Clark has a leading reputation to uphold and an absolute commitment and determination to always be the best. Its tax practice is reliant on the support of reliable tax software to help manage clients' tax affairs efficiently and accurately. In 2011, the Partners became concerned that it was no longer possible to rely on the accuracy of its incumbent tax software.

The decision was taken to replace the software with a suite of tax solutions that the tax teams could trust. This occurred at around the same time PKF Francis Clark merged with a Cornwall practice, Winter Rule, which used Digita tax software.

The Winter Rule recommendation was enough for PKF Francis Clark and the firm implemented Digita Personal Tax, Business Tax, Trust Tax and the iXBRL Conversion Tool in September 2011.

Tracey Dodd, Tax Senior at PKF Francis Clark summed up Thomson Reuters in a just a few words: "We have faith in Digita software and it is reliable. The team has taken the time to check the figures and have consistently found that they are 100% accurate. We like the way the software



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approaches averaging and the fact that it works out the calculations and the adjustments for the previous year for you. This saves us time," Tracey continued.

One of the features that impressed the firm is the automatic carry forward and set off of losses, something their previous software did not do. "Losses are rolled forward and, where set off is mandatory, Digita does this automatically which means that we cannot overlook them, helping to minimise the risk of errors," Tracey commented.

The Tracker that is used to automatically track tax return tasks is proving a real boon as it updates automatically and "you don't have to remember to fill in the boxes." Realising there is no need to fill in boxes to alert the software that a particular task has been completed surprised the team in the initial stages. "The software is intuitive and the process is automated which is in stark contrast to our previous software," Tracey added.



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PKF FRANCIS CLARK
Tracey Dodd
Tax Senior

About

Established in 1919 Francis Clark is a Top 30 UK firm of chartered accountants with 8 offices in the UK, 59 partners and 600 staff. In 2016, the firm joined PKF, the international network of independently owned accountancy practices which has a global presence in 150 countries and has re-branded as PKF Francis Clark.

Website

You can learn more about the firm and the services they offer at www.pkf-francisclark.co.uk



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PKF Francis Clark appreciates the strength of Digita tax software to ensure accuracy through comprehensive tax computations that correctly calculate client tax liabilities.

PKF Francis Clark and Thomson Reuters are perfectly matched. Both are winners of Lexis Nexis Tax Awards, with Digita Personal Tax the only three-time winner of the Best Tax Software Award and PKF Francis Clark winner of Best General Tax Practice in 2009 and the Best Tax Practice in a Regional Firm, and Truro partner, John Endacott, Tax Writer of the Year, at the 2012 awards.



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