

Datamatics Delivers

Cost-Efficient Tax Solutions

to A Leading Canadian Chartered Accounting Firm

About the Client:

The client is a leading Canada-based Chartered Accounting firm specializing in financial and tax resources for entrepreneurs, family business owners, and professionals.

Industry Focus

CPA/ Chartered Accountants

Geography Focus

Canada

Overview:

As a leading chartered accounting firm in Canada, our client was looking to attain cost and processing time efficiency in processing –

- **Personal Income Tax Returns [T1]**
- **Corporate Income Tax Returns [T2]**

Objective

To attain cost efficiency in personal & corporate income tax returns, the firm wanted to –



Reduce turnaround time (TAT)



Increase accuracy in tax return preparation



Deliver timely tax return processing for their clients

Project Highlights

Given the diverse nature of the firm's clientele, we had to tailor a solution that effectively addressed their business needs. To do so, we had to design a quality checklist to standardize processes and workflows and safeguard sensitive data during tax processing. We also developed a custom BOT to automate the process and were able to bring down the Turn Around Time (TAT) for some of the tasks by as much as 80%.

Business Challenges

The engagement with the client presented us with unique some business challenges –

Achieving cost efficiency in processing:

- Personal income tax returns [T1]
- Corporate income tax returns [T2]



Reduce turnaround time (TAT)



Boost accuracy in tax return preparation



Manage unstructured documents



Adherence to Canadian tax laws

Datamatics Solution

Upon closely understanding the business requirements of the client, our team of Canadian tax experts devised an effective solution. The highlights of the solution include –



A dedicated workforce of experts in Canadian tax for individuals and corporate tax for managing the inflow and outflow of tax returns.



The project coordinator and the quality team were set up to update the client about Canadian tax laws



We designed a quality checklist to standardize queries and improve TAT.



Managed unstructured documents and organized taxpayers' data securely

Business Benefits

Through our specialized tax preparation solution, we were able to –



Bring down operational costs by ~30%+



Increase efficiency and effectiveness of their tax preparation process through integrated technology and human expertise



Bring down overall Turn Around Time (TAT) by ~30%



Bring down the Turn Around Time (TAT) through our custom BOT for some tasks by ~80%



Achieve quicker TAT through 24X7 dedicated technical support



For more information,
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About Datamatics Business Solutions Limited (DBSL)

Datamatics Business Solutions has over 50 years of experience providing scalable and efficient Accounting, Bookkeeping, Advisory, and Tax preparation services to CPAs worldwide. With a global clientele of 150+ CPAs, 1500+ strong workforce and qualified accounting professionals, and a track record of preparing 1M+ tax returns and bookkeeping records, it enables CPAs to streamline their financial operations, ensure compliance, and drive growth.

The expertise of Datamatics' experienced and qualified accounting professionals backed by advanced accounting software and technologies gives it the in-depth knowledge of accounting principles, tax regulations, and industry best practices required to earn the trust and loyalty of CPA clients worldwide. Datamatics Business Solutions is your one-stop shop for accounting services to thrive in a dynamic and competitive landscape.

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