



Inform Direct is trusted choice for new accountancy practice

Setting up a new accountancy practice can be a daunting experience and that's why it's important to choose software you can rely on. Jacquelyn Walmsley did just that when she decided to use Inform Direct for company secretarial after setting up Jaxx Accountancy.

Located in Airdrie, north Lanarkshire, the firm has a growing portfolio of SMEs spanning different sectors and located mainly in central Scotland, with a few in England.

Setting up

After qualifying, Jacquelyn worked in other practices, latterly in a senior management role with her own team. Making the decision to set up on her own was based on wanting direct contact with clients, doing the work she loved and having greater flexibility in terms of decision-making.

She says: "I first met the Inform Direct team at Accountex North although I had used the software in my previous role. So when it came to setting up on my own, for me it was a 'given' that I would use it too. Essentially I wanted to offer a comprehensive cosec service to my clients, whatever they might need me to do. I figured that I could deliver this reliably by incorporating software I could trust, that adds value to a business of any size, from day one. This would also leave me free to focus on all the many other tasks on my desk and avoid the effort and disruption of data migration later on.

"I opted for the one-month free trial to see how it would work alongside my other systems on a day-to-day basis – I use Xero and TaxCalc – which is a great way to road-test all the different functions. It worked seamlessly and we now have over 30 companies on the platform and adding more as we grow."

Jacquelyn already uses a wide range of features within Inform Direct, including forming new companies, confirmation statements, processing dividends and creating dividend vouchers, producing share certificates, changing registered office and officer addresses, appointing new officers, share allotment and transfer and filing dormant accounts.

Achieving software benefits

As her team expands, Jacquelyn plans to ensure others can use Inform Direct too. She has always found it really easy to use and very intuitive. The simple interface and tailored reminders mean she doesn't miss deadlines and can complete any company secretarial work quickly and correctly, benefits which continue to be very important with so much going on. Fully compliant documentation can be prepared for clients at the touch of a button and an expert team is always delighted to help.

Jacquelyn has wider aims for her practice. "One of my objectives is to modernise the traditional image of the accountancy profession and I see harnessing trusted software – including Inform Direct – as an important part of this", she says. "Many people still think you connect with your accountant once a year when you meet to discuss the annual accounts but it doesn't need to be like that.

Business partner

"I want to work more as a business partner with my clients, using technology effectively, building relationships and having an ongoing dialogue. This will enable me to play a positive role in their business and contribute to decisions, as well as being approachable should they need advice or help at any time.

"The personalised service I want to provide to my clients is similar to the way Inform Direct supports me, as a software provider delivering efficient and time-saving solutions as I grow the business.

"It's still early days for me but the advice I'd give to anyone looking to go it alone is to ensure you have software you can trust right from the start which will save you time and offer reassurance. It's also important to reach out to other accountants and support each other through a network, so you can share challenges and solutions."