magnetic | Gilbert CPAs

CUSTOMER CASE STUDY

More time with clients — without adding headcount

Gilbert CPAs created more capacity across its whole team, without hiring more staff for the bandwidth.



01 THE CHALLENGE

Gilbert CPAs has served the Sacramento region for more than 42 years, with a tax department of roughly 15–18 people. Like most firms, it has felt the entry-level talent pool tighten, creating a challenge not only in managing workload, but in preserving the time their team has to understand clients, answer questions, and provide meaningful advice.

02 THE APPROACH

By reducing time spent on return preparation and initial review with Magnetic, Gilbert's staff can take on more review responsibility, while managers and partners have more capacity to focus on higher-level review, planning, and client conversations.



"We're not trying to solve the capacity challenge just by adding people. *We're changing how the work gets done,* so our staff can grow into more responsibility and our managers and partners can spend more time where they add the most value."

Keith Glen, CPA · Tax Shareholder, Gilbert CPAs

WHAT CHANGED

How the team's work changed

More time went to advice, not admin.

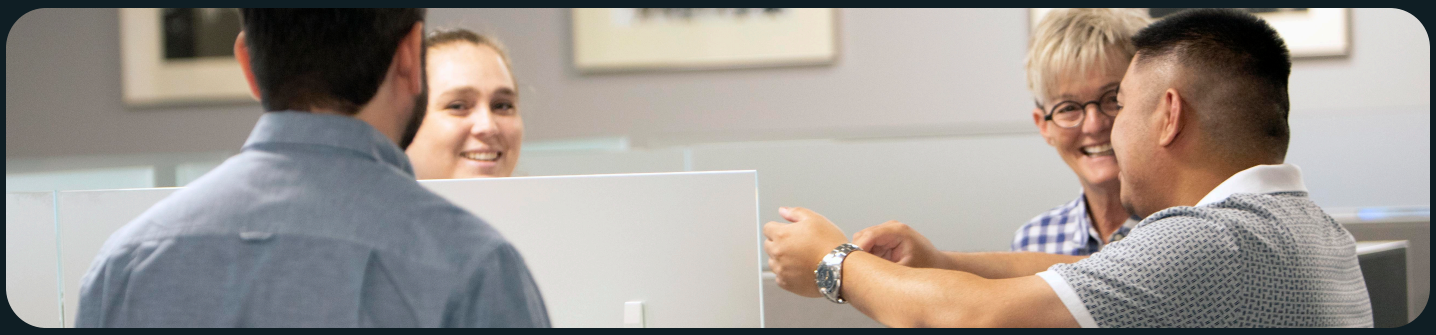
With more of the preparation process handled by Magnetic, the whole team — not just partners — has additional capacity to focus on questions, planning, and the advisory work Keith calls "quite honestly the fun part."

Preparers became first-layer reviewers.

Magnetic now handles first-pass prep on nearly all returns; staff review the draft, fill in what's missing, and clear it for the next level, a role Gilbert is rolling out to all returns in 2027.

Turnaround held up under pressure.

Returns typically came back in a couple of days, by Keith's account. That mattered most during extension season, when even last-minute documents could still get a meaningful estimate.



"Nobody comes to us because they simply want a tax return prepared. They want to know what it means for them and what they should be thinking about next. **The less time we spend on the mechanics, the more time we have for those conversations.** That's the part of the job we really enjoy."

Keith Glen, CPA · Tax Shareholder, Gilbert CPAs

THE BOTTOM LINE

For Gilbert, the value isn't simply additional tax capacity. It's how that capacity gets used: giving professionals more time to advise clients, develop their skills, and strengthen the relationships that are central to the firm's service.