magnetic

CUSTOMER CASE STUDY

Half the staff, *every deadline met*



THE CHALLENGE

Kelli founded her firm in 2017 and grew it to a team of 5 to 12. After a staffing change in late 2024, she went into the 2026 season with about half her usual team.

That's when she brought in Magnetic.



"We filed everything that was ready for us by April 15. *That was something I honestly did not think was possible.*"

Kelli Cox · Firm Owner

WHAT CHANGED

01

Deadlines met with half the team

About 500 of roughly 700 returns filed by April 15, after a prior year of more extensions than ever.

02

Hours back on every return

Kelli estimates two hours of prep saved per 1040, and her review time cut at least in half.

03

Quality she could compare

Next to SurePrep Outsource, Kelli found Magnetic more accurate and thorough, and switched over.

THE BOTTOM LINE

Kelli didn't have time to hire or train her way out of a staffing crisis. Magnetic gave her a team's worth of capacity, at a quality she trusts, in the season she needed it most.