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CUSTOMER CASE STUDY

# How LJB CPA Expanded Tax Capacity with Magnetic

A practical approach to increasing capacity while keeping professional judgment and client service at the center

THE OUTCOME

## Faster turnaround on many individual returns, and *more* of the team's *time on review, planning, and client communication.*

01 THE CHALLENGE

### Capacity, not demand

Individual return volume became a significant constraint as the firm grew. Finding enough experienced preparers and reviewers couldn't keep pace.

02 THE APPROACH

### Routine prep, off the team's plate

Magnetic handles much of the routine preparation on individual returns, with no firm-wide implementation.

03 THE RESULT

### Faster, with the same standards

Improved workflow efficiency and faster turnaround. LJB keeps its review process and professional oversight.



"We were looking for a meaningful capacity solution, ***not simply another system for our team to learn and manage.*** Magnetic offered a practical way to support our preparation workflow while allowing our people to stay focused on review, professional judgment, and client service."

**Dilshad Ali** · Senior Tax Manager, LJB CPA

WHAT CHANGED

# How the team's work changed

### More focus on review and professional judgment

More time to check return information, compare against prior-year results, and flag items for client discussion.

### A risk-based review approach

Manager attention goes to higher-complexity engagements, under the same review and quality-control standards.

### More time for client relationships

Managers and partners have more capacity for client conversations, advisory opportunities, and firm growth.

### More proactive communication

The team can connect with clients before deadlines and quarterly estimates.



"We're open with our clients about how we use AI. Our people focus on the relationship and the judgment calls, and we let the technology handle the first level tax preparation work. **Magnetic gave us real capacity without asking our team to take on another implementation.**"

**Caitlin LeMaire** · Partner and Chief Operating Officer, LJB CPA

WHY IT WORKED

## Capacity without a new system to maintain and manage

LJB did not need a dedicated internal owner or broad adoption before seeing benefits. Magnetic provides preparation support within a defined workflow, while LJB retains review, professional judgment, client communication, and delivery.

"Magnetic has become an important part of how we address capacity. For firms facing a similar challenge, our advice is simple: evaluate the model, understand how it fits your quality-control process, and see whether it can help your team focus on the work that creates the most value for clients."

**Dilshad Ali** · Senior Tax Manager, LJB CPA