

# THE PROFESSIONAL

## PUBLIC ACCOUNTANT

### Special Supplement

## “Proprietary, Patent-Pending” Part II



“Marie, look at the breakfast tray this morning. It looks great.”

Marie was eyeing the scrambled egg and sausage burrito. “I hope nobody takes this one. It’s got my name all over

it. How many clients came through yesterday?”

“It was a big Saturday. Forty-three on my shift and Sarah had 48 before I got here. We had a total of 88 drop-offs and mail-ins on top of that. Good thing we’ve got four scanners. Angela and I scanned our fingers to the bone.”

Marie laughs at Judy. The trio enjoys each other and especially like recruitment day. “Jeffrey is bringing our guests in from the airport; they should be here in about half an hour.”

Just then the back door to the parking lot opens and a blast of Colorado winter rushes in ahead of Rik Brown.

Marie and Judy run to greet Rik, take his coat and push a cup of hot cocoa into his first ungloved hand.

“Look at your tan.” Marie bubbles. “Have you been skiing?” The trio looks forward to Rik being in the office.

“Mary Jane. She’s my favorite. I’ve been learning all over again. The fresh powder is the best.” Marie and Judy know he is referring to one of the popular ski runs at Winter Park, west of the Continental Divide. They are happy for him. He is radiant, like the first yellow crocus that announces spring is almost near.

“Victor Hesse remarked to me how great you are looking. He said you never seem to age,” Marie reports.

Rik makes a squeamish face. “Thanks, Marie. I’ve been putting it off but I know you’re right.” Rik makes a note in his PDA to remedy that potential problem.

The front door of the office opens and Jeffrey Traub holds the door as three men and two women pass him in appreciation. Rik, Marie and Judy greet everyone and introduce themselves. Jeffrey closes the door as the guests all cuddle themselves in their warmest clothes. None of them are appropriately dressed for this Sunday in Colorado. Jeffrey embraces Rik. “How’s my favorite propeller-head?”

Rik is amused by the affectionately used name. It’s better than “geek”, which is who he was always known as in high school and at The Colorado School of Mines, his alma mater. As a graduate with a degree in computer science, Rik was always a natural with computers and all the bells and whistles for computers the moment they hit the market. His education was fully funded by scholarships. His pocket money was spent on a steady stream of changing computer technology. Working for his uncle at tax time was how he afforded his computer gadget habit. From there he found his career path in accounting,

bringing his love for computer technology along as his business partner.

Jeffrey continues the introductions. “Everyone, I’d like you to meet Audrey Little and Harvey Brinker, CPAs from Phoenix.” Everyone smiles and nods as Marie passes out cocoa and coffee. “Everyone, this is Barry Buskirk, EA, PA from Los Angeles. Barry was going to visit us last year, but decided to delay his visit. And these fine folks are Ginny Clemens, PA and Paul Petro, CFP, EA, from Long Beach. They were referred to us by Andy Jepsen.” Just the mention of Mr. Jepsen puts a smile on the faces of all who know him. He packs a snowball light as air so when it hits you, you like it. Marie recalls his pure white hair and impish face as he packs snowballs and stockpiles them in his pockets.

Judy passes the breakfast tray around and after everyone makes their selection, Judy pops the items into the microwave for a quick reheating. Marie giggles after the tray makes it past everyone and the burrito is still unclaimed. Judy winks at her.

As the guests finish eating and sharing tax season stories with Rik, five chairs are arranged in one private office. Computers, scanners and monitors are powered up and Jeffrey announces to Rik that everything is ready.

“Ladies and gentlemen, welcome. I know you have many questions about today’s meeting and have come here during your busiest time of year based on very little information other than what you are about to learn may change your life,” Rik begins. “Ladies and gentlemen, prepare to be amazed.”

Marie begins the demonstration by greeting an imaginary client and scanning a package of documents not unfamiliar to the scanner from many prior demonstrations. She then guides the imaginary client down the hall toward the private offices. The guests are guided into the office, becoming the imaginary client as they take their seats. Marie announces that Rik is on the line as the monitor comes to life. Rik smiles from the monitor and says, “John and Mary, how was your year?”

The guests are speechless and no one moves. Rik whispers to Harvey, “Answer as John, Harvey.”

Electronic Rik responds, “I’m sorry, I didn’t catch that. Would you say it again?”

Harvey says, “Uh, it was a great year. How about yours?”

“Thanks for asking, John. I’m very blessed.” Electronic Rik continues, “I understand you have a few questions for me, and I have a few for you as well. Congratulations on the birth of your daughter. I can’t make out Tiffany’s birth date. Can you clarify that for me?”

Rik leans over the client organizer, now open on the desktop. He points to the handwritten birth date which is illegibly written, even for the advanced OCR or Optical Character Recognition software designed into the powerful interactive system.

“Her birth date is September 6<sup>th</sup>,” Harvey responds for John.

“Thank you. I also need the settlement statement on the sale of your rental property. Judy will give you a reminder list before you leave today. I need you to sign our Engagement Letter on the Scribbler Tablet. Judy will give you that as well.”

Electronic Rik pauses to smile at John and Mary. “Thank you. Now, what would you like to ask me?”

Audrey answers for Mary and begins a question she was asked this week. “How many dependents should I claim if I go back to work half-time at \$15 an hour beginning in June?”

Rik responds with a smile, “That’s very interesting, Mary. Let me do some calculations for you and I’ll include a W-4 with your tax returns which you can give to your employer. Would that work for you?”

Paul’s mouth has been agape since electronic Rik first appeared. “How do you do that?”

Rik definitely has their attention. “I’ve been working on this system for more than fifteen years. There’s the OCR, voice recognition, dictionary coding, video and audio streaming, sensing techniques and proprietary software that doesn’t have a name but is patent pending. The only thing that changes each year is the tax law database and format. That retrofits to one of the big tax software publishers so we don’t have to reinvent the wheel annually.”

Marie gives him a sideways look.

“Oh, yes. The other thing that changes each year is me. I did the current training of the system five years ago and clients are beginning to notice that I’m not ageing. It’s time to update my image. It takes about six hours to record all the variables. The software prompts me for the recording, like a karaoke player. It even tells me when to smile warmly or look sad.”

Rik sips his cocoa and gives the guests a few moments to digest what they are seeing. “With the help of Marie, Sarah, Judy and a small staff of high school part-timers to feed the scanners, this office prepares nearly 10,000 tax returns each year. The office in Colorado Springs does about half that many. We keep our prices down and business just keeps growing.”

“What about errors and problems and signatures and changes and . . . and” the guests are all asking the FAQs, the frequently asked questions the presentation generates every recruitment Sunday.

Rik waits until they have run themselves dry with questions of disbelief and hope that what they have witnessed is not some sort of trickery. “Between the scanners, voice input, the occasional keyboard input and the extremely rare need for my personal input, the system has been designed, tested and proven to generate flawless tax returns. Over the years, we’ve worked out the problems and there just aren’t any at this point.”

The guests are relaxing as is always the pattern. They are beginning to dismiss their skepticism in exchange for anticipation of what this could mean to each of them.

“You have been selected to be here today based upon some very important criteria.”

“Based on what?” Audrey Little asks as the statement alerts her like a paper cut on the index finger.

The time has come for the dark side of the Sunday presentation. Marie and Judy leave the group. This is the part they never like to be present to watch.

“Based on the fact that you all are single-practitioner offices, you all have long-term trusted office staff, you all have grown your practices to the point of maximum client capacity and you are all considering retirement.” Rik watches as they each acknowledge that the description fits them well. “The most important part of the contract you have signed to witness this demonstration and will be asked to sign as a user is that of confidentiality. Can you imagine what would happen if your clients ever found out that the professional they think they are meeting with is your electronic image and not you at some remote location?”

The reality of the deception was now taking hold among the five guests.

“As your practice, and I use the term loosely, continues to grow, can you imagine what would happen if clients learned that your electronic self was interviewing clients in every room of your office simultaneously?”

“What happens when clients call with questions?” Audrey asked.

“Your staff will answer and then forward the caller to the system for a personal, of sorts, conference. The system already knows all the details of the client history and all the details of tax law. The niceties are added by you in the karaoke computer set-up session and what else is there? Don’t you feel like you’re on automatic pilot some days right now?”

Smiles begin to spread among the five guests like the spring thawing snow pack as its rivulets become streams and those streams become the Colorado River on its way to the ocean. The group, once again individuals with individual hopes and plans have chosen their futures.

Marie, Judy and Jeffrey return to refill cups and distribute contract packages to the guests. Another group with dreams of retirement has been recruited to the links, slopes, beaches and malls in search of the perfect soft-serve cone. But today, retirement begins with a snowball fight.

**by Joanne L. Konrade, EA, PA**