



TRANSFORMING CHALLENGES INTO ADVISORY OPPORTUNITIES: THE DEFREITAS & MINSKY STORY



DeFreitas & Minsky LLP is a full-service CPA firm based in New York, with offices in Jericho and Greenport. With over 70 years of dedicated service to a mix of individual and business clients, the firm focuses on strategic guidance rather than just numbers. They have cultivated many long-term relationships, emphasizing personal service and smart technology. Owner Manny DeFreitas leads the charge, and Melissa Madsen, director of tax and reporting, is an integral part of the key leadership team.

As they transitioned to a more advisory role, they faced challenges in payroll efficiency, inconsistent systems, and difficulties in tracking year-end information. "Business is just much quicker today," says Manny. "The client wants you to take care of all of it for them."

BUSINESS CHALLENGES

- ➔ Managing client payroll and tax advisory was clunky, with client information dispersed across multiple systems.
- ➔ Providing real advisory services was difficult requiring a lot of manual work and time-consuming data gathering.
- ➔ Because client information was dispersed across multiple platforms, expanding their advisory services was nearly impossible without hiring additional staff.

QUICK FACTS

Name: DeFreitas & Minsky LLP

Industry: Accounting Services

Employees: 15

Headquarters: New York, NY

ADP Products: ADP®RUN for Partners, ADP® Accountant Connect

Interviewee 1: Manny DeFreitas, CFP, CPA an Owner

Interviewee 2: Melissa Madsen, Director of Tax and Reporting





Through their partnership with ADP, DeFreitas & Minsky has transformed their service delivery model, managing their clients' payroll, reporting, tax forms, retirement benefits, and workers' compensation insurance all through ADP's single platform, simplifying their access to client information and giving them the ability to provide truly strategic advisory services to their clients.

LIFE BEFORE ADP

Before ADP, the staff at DeFreitas & Minsky struggled to manage their clients' needs with client information housed across multiple platforms, hindering their ability to provide accounting and advisory services to their clients in a timely manner. *"Before ADP, payroll was clunky,"* says Manny. And managing payroll wasn't the only challenge. *"The type of reports we would receive were all over the place,"* says Melissa. *"ADP really helped streamline that for us. At the click of a button, we can now access anything we need. ADP's platform is a one-stop shop — it helps us streamline payroll and focus on advising clients."*

DEDICATED ADP ACCOUNT SUPPORT

Having a dedicated ADP representative has been a game-changer for the DeFreitas & Minsky team. Before, Manny and Melissa didn't have a clear understanding of which ADP platforms could best meet their clients' needs. This meant they rarely recommended ADP solutions. After establishing better communication with their account representative and learning about the value of ADP's broader offerings, they now feel confident in recommending ADP solutions they know will meet their clients' unique needs and help position them better as a strategic supporter and advisor to their clients. This helped open the door to more collaboration and a partnership that now complements their existing client model, helping them serve their clients better through the ADP partnership platform. Now, they have the confidence to leverage ADP's broader suite of offerings, which allows them to meet their clients' unique needs and expand their business.

"Having a dedicated ADP rep is a tremendous benefit for the firm," says Manny. Support doesn't stop with their account rep either. Melissa says that their client services team is easy to reach and helpful, too. *"I always get a real person on the other end of the line. Within one or two rings, someone answers."* This close collaboration has established a solid foundation for trust and transparency, allowing DeFreitas & Minsky to maximize the benefits of ADP's offerings not only for themselves but also for their clients.

MORE THAN JUST TAX SERVICES

Manny and his team provide more support to their clients than your traditional accounting firm, emphasized by DeFreitas & Minsky managing Forms W-2, research and development (R&D) credits and other financial obligations. *"We are a full-service CPA firm,"* says Manny. Instead of just filing taxes at the end of the year, the team at DeFreitas & Minsky provides strategic advisory services to clients as well as account management. *"We're going to be able to handle all your payroll, W2s, 401(k), R&D credits, workers' compensation and pension plans,"* says Manny. *"Any major component is now done simultaneously when we do payroll in ADP, and once it's set up, we keep it running for our clients on autopilot."*

"Payroll is less manually intensive from a labor point of view for the client and for us. ADP, with their software, is able to produce everything we need so we can really advise our clients."

— Manny DeFreitas

Owner, DeFreitas & Minsky LLP



Partnering with ADP has saved DeFreitas & Minsky LLP countless hours of administrative work, enabling them to focus more on growing their client relationships and offering them strategic advice to help grow their businesses.



Now, instead of having to hire more people to manage clients' scattered data and information, the team at **DeFreitas & Minsky LLP can scale at their own pace** while helping take their clients to the next level.

SHIFTING FROM REACTIVE TO PROACTIVE WITH ACCOUNTANT CONNECT

As they brought more and more of their clients onto ADP's payroll platform, it gave them access to client information through the ADP Accountant Connect platform. This has revolutionized the way the team at DeFreitas & Minsky handles client requests. Instead of handling requests reactively, with the information now at their fingertips, they don't have to spend nearly as much time looking for and reviewing numbers.

EASY ACCESS TO CLIENT INFORMATION SAVES TIME

"We don't want our clients waiting for data or information from us and now that we have clients on ADP," says Manny. "We use the most sophisticated technology you can have, which helps them get their figures and numbers and advisory services sooner than later." Instant access to reports and streamlined GL integration saves them significant time, freeing up resources to focus on client relationships and strategic advisory functions, effectively enhancing the services they provide to their clients.

EASE OF PAYROLL: FAST, SIMPLE, EFFICIENT

Payroll processing for clients has also become incredibly simple and efficient using the RUN Powered by ADP solution. Manny says processes are much easier than before. *"It's less manually intensive from a labor point of view for the client and for us. ADP, with their software, is able to produce everything we need so we can really advise."* With just a few clicks, adjustments can be made, compliance is managed in the background, and DeFreitas & Minsky LLP employees can access client information with a few clicks, allowing them to service clients quickly and easily.

ANTICIPATING FUTURE GROWTH WITH PEACE OF MIND AND SUPPORT FROM ADP

Looking ahead, the leaders at DeFreitas & Minsky view their partnership with ADP as a crucial element in their growth strategy. With ADP's support, they can confidently focus on expanding their advisory services, knowing they have a reliable partner prepared to adapt to their evolving needs. *"When looking for a partner, we need someone that is going to be able to grow with us and can really help take our clients to the next level," says Melissa. "And we've found that in ADP. We started with ADP 20 to 30 years ago, and we haven't switched," says Melissa.*



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