

GruntWorx®

CASE STUDY

Bluestem Financial Advisors, LLC



MaryBess Gordon | Director of Client Services
Nick Vogel | Financial Advisor

Bluestem Financial Advisors is a comprehensive, fee-only personal financial planning firm. The firm has been using GruntWorx since 2017 and relies on Intuit Lacerte® as its tax preparation software. The firm serves young professionals, pre-retirees, and University professionals, who are primarily individual tax clients and processes 98% of its 1040 returns through GruntWorx. For the team, GruntWorx became more than a productivity tool—it became a critical part of their staffing strategy.

THE CHALLENGE

Before implementing GruntWorx, tax document preparation was entirely manual.

Clients would bring in stacks of tax documents that had to be sorted into an accordion folder with designated tabs for each document type. Documents were then scanned, combined into a PDF, organized, and manually entered into Lacerte.

"It was all me on the front end. People would bring me stacks of tax documents. I would hand sort them into tabs, scan them into the computer, create one big PDF, and then preparers would manually enter everything into Lacerte." -MaryBess Gordon

As the firm grew, this process became increasingly difficult to scale.

THE SOLUTION

The firm first learned about GruntWorx through a peer recommendation from a study group member. After evaluating the solution, the decision was straightforward.

Implementation was quick and required very little onboarding.

Today, GruntWorx is integrated into the firm's standard workflow.

Current Workflow

- Client Services receives and reviews client documents.
- Documents are uploaded to GruntWorx PREMIUM Solution.
- Processed files are downloaded and handed off to the tax preparation team.
- Tax preparers populate data into Lacerte and prepare rest of return.
- Advisors perform final review.



For Bluestem Financial Advisors, GruntWorx has evolved from a document processing tool into a strategic member of the tax team.

"I cannot imagine not having GruntWorx as part of our tax process. It's quite literally a team member during tax season."
-MaryBess Gordon

After nearly a decade of use, the firm continues to rely on GruntWorx to streamline document organization, reduce manual data entry, improve scalability, and help their team focus on higher-value work.

"One of the things GruntWorx does that's unsung a lot of times is organizing the workpapers in the order that we want them."
-Nicholas Vogel

THE RESULTS

35–40 Minutes Saved Per Return

MaryBess estimates that GruntWorx saves roughly 25 to 30 minutes per return on the front-end process alone by eliminating manual sorting and organization.

Nick estimates another 10 minutes per return saved from eliminating manual data entry.

"It's going to save at least 10 minutes just from punching in numbers." -Nicholas Vogel

For a firm processing hundreds of returns annually, these efficiencies add up quickly.

CUSTOMER VOICE

When asked to describe GruntWorx in three words: **Efficient, Easy, and Quick.** Nick also described GruntWorx as a **"One-button solution."**

Advice for Firms Considering GruntWorx

The firm's advice is simple *"Use it as much as you can. Trust the product and use it as much as you can."* -MaryBess Gordon

Nick echoed the sentiment, noting that GruntWorx has become a standard part of the firm's workflow because of its consistency and reliability.

Over nearly a decade of use, the firm has experienced very few issues.

The team also reports positive experiences with customer support.