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festooned your website with digital garland and blinking lights? Let's take a moment to consider

Gail Perry • Dec. 08, 2014

How are you interacting with your clients this holiday season? Are you sending gifts or cards? Are you answering your phones with a holiday greeting? Have you festooned your website with digital garland and blinking lights? Let's take a moment to consider the opportunities that the holidays present to us as we close out the year.

You probably meet with your clients each year as the year-end approaches or early in the next year to talk about taxes or help with closing the books. Those meetings are anticipated by your clients and probably welcomed by them. In addition to these traditional services, consider adding the following to your repertoire:

Planning: Are your clients in a rut? Does their financial picture look the same year after year? Have you worked with them in the past to construct a future plan for their business or their personal finances? Why not use the backdrop of the holiday season to schedule a personal one-on-one meeting where they can bring their financial concerns to you and you can offer advice and insights that will benefit them for years to come.

Technology: How current are your clients with technological advances? The more technologically savvy your clients are when it comes to their finances, the easier your job is going to be. Take a look at the tools that are available for streamlining the information-gathering process, providing financial dashboards, and automating mundane tasks so that both you and your clients can use your time more advantageously in the future.

Closing the books: Every year your clients need financial statements and year-end wrap-ups to help them with taxes, future borrowing, and informed planning. As you

go through the steps that you repeat each year, think about what you would like to

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typing some often-repeated advice in an email message, take the time to really think about specific steps your clients can take to improve their financial lives and send your clients those tips in color on slick paper or even in a small keepsake booklet that the clients are likely to keep.

- **Give back to your community** through a volunteer effort that could involve not just your staff but your clients as well – join forces to make the area where you live and work together a better place.
- **Use your signature lines** in email messages and the home page on your website to offer heartfelt greetings to clients during the holiday season. When you communicate with your clients, remember that they are spending these days connecting with family and friends and don't be afraid to ask them to refer your services. Remind them of the start-up services you offer to new clients.
- **Take your annual holiday party** beyond the borders of your office and consider holding an event in conjunction with one of your clients, or schedule a company open house and invite your clients to attend.
- **If you're trying to break into a new niche**, hold your holiday party in a location that will attract the attention of the people and companies in that niche area. And remember that a holiday party doesn't have to occur in December. Start your planning now to schedule an event in the new year.

Happy holidays from CPA Practice Advisor!

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