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Jun. 22, 2005

At the top of every one of Norman Golden's invoices is the following phrase: "If you like my service, tell your friends. If you don't, tell me."

To the principal of the San Mateo, California-based tax firm of Norman M. Golden, EA (www.GoldenTax.com), this is more than just a slogan — it's a part of his business philosophy.

While some tax preparation firms open their doors to the masses and treat their clients like customers in a fast food restaurant, Norman believes that the relationship between a taxpayer and their tax professional has to be built on mutual trust and respect. So he selects his clients carefully.

"If you have built a positive relationship with a client, they recognize the value of your part in the relationship as a tax professional with the experience and knowledge of tax law to provide them with tax planning and preparation," explained Norman.

"But if the relationship is weak, then they don't respect the value of the tax professional's expertise. If a client thinks that they can prepare their own taxes just as competently as a professional, then they either have a lot of time on their hands to do research or they obviously don't see your service as a value."

Then there are the occasional tax cheats. "There are some people out there that aren't really looking for a tax professional; they're looking for an accomplice to help them cheat the system," he said. Aside from the ethical rationale for avoiding such clients, Norman notes that "as tax professionals, our licenses are too valuable to put on the line for dishonest tax payers."

“Unfortunately,” he says, “there are always

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needs to since only one of his tax preparation clients has ever been audited. He has, however, represented businesses and individuals that were undergoing audits of returns prepared by others.

One of the reasons for his 1 in 5,000+ audit record is his preference for original client documents. “As much as possible, I want my clients to provide me with their originals so that I can get a firm grasp on their financial situation.” This helps him provide better service to his clients, and also helps prevent errors or omissions that could result in an audit. Sometimes this missing information is an oversight, but it can be intentional.

This penchant for original documents may conflict with the trend toward online client organizers, but Norman believes these systems are valuable when used carefully. Over-dependence on them, he says, may erode the value of his services. “If the client spends too much time inputting their own data into a program or web portal, their respect for the value of the services that I provide may be diminished, and they might try to do the return themselves.”

He has readily embraced other technologies, however, including moving toward a paperless office by generating electronic copies of all client work and correspondence, as well as using online tax research to complement his firm's tax preparation software. He also ensures that his firm's web site (www.GoldenTax.com) is actively maintained with fresh content that provides value to his clients. To assess his firm's use of technology, Norman took the free Productivity Survey located at www.CPATechAdvisor.com/productivity. The firm received an above average Productivity Score of 193.

With most of his client work being focused on 1040s, his practice does swing into a heavier workload during the primary tax season, but not entirely. “April 15 is just the

end of round one of a three-round bout,” he said. “Then you have extensions and, of

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returns were due by May 31, and taxpayers have until June 30, to pay past debts.

This was a good way of getting otherwise honest people back on track, he said. “Sometimes people have an event or some kind of occurrence in their life, and they don’t file one year. And then they grow afraid of the system and don’t file the next year and maybe even longer.” The program also let people who filed erroneous returns correct them without fear of legal consequences.

In addition to running his tax practice, on June 1, Norman Golden became president of the California Society of Enrolled Agents, after serving in various other roles with the organization.

Technology

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