CPA
Practice Advisor

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Gail Perry • Aug. 11, 2014

Accounting for Life – A Blog by Gail Perry, CPA

When I think of August, I think of lazy hot summer days that last from whenever my friends and I wake up to when the streetlights come on - the sign to end summer play and return home for the night. I'm glad I have a head full of sweet summer memories

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you should be thinking about for your accounting practice – steps you can take to benefit from days when the workload is lighter and morale is high.

- Remind staff to take advantage of available vacation days before the year slips away from them.
- Contact clients with a checklist for the rest of the year so they will be prepared to work more efficiently with you at year-end and during busy season.
- If you prepare taxes, connect with your extension clients now instead of waiting until the October deadline is upon you.
- Consider your software needs. Assess the programs you used in the product reviews (www.cpapracticeadvisor.com/reviews) provided by *CPA Practice Advisor*.
- Schedule a fall open house for your clients. Invite them to your office, let them meet the staff, offer refreshments, and provide a short useful presentation or offer a handout with tips for starting a new business, information on retirement planning, advice for financing college education, or instructions for year-end planning.
- Question your staff about flex-time requirements and other needs as their children head back to school.
- Discuss plans for health care benefits now instead of waiting until open season is upon you later in the fall.
- The phrase, "Stop and smell the roses," might sound cliché, but think about closing your office early or even completely on some Fridays so staff members can enjoy some extra family time before summer ends.
- And finally, don't forget those less fortunate than you. What can your firm do this month for the community?

Firm Management

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