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to save the day.

**Gail Perry** • Mar. 16, 2016



Strains of “Holding Out for a Hero” (Bonnie Tyler/Footloose) are racing through my

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Our job, in the eyes of our clients, is to save them money. In our eyes, our job is to prepare taxes accurately and yes, where there is a choice to be made, choose the most cost effective method, but at the end of the day, we want to do it right. Of course our clients want things done correctly too, but you know that eager anticipation as they wait for the unveiling of their tax return – how much money am I going to get back?

It's the hero element that we tax accountants share. We lead the charge, carrying the flag into (IRS audit) battle, we quarterback the team and determine the plays, we find the best solutions to the tax problems. And our clients need us more than ever.

Think about taking some pages from the Peyton Manning preparation book when getting ready to meet with clients, and keep that hero image in mind:

- Use your down time (I know, there's not much of it during tax season, but you can grab a few minutes here and there) to make sure you're up-to-date not just on all of the latest tax laws but on the latest phishing scams going around.
- Know the competition. Familiarize yourself with how your clients' competitors perform in the marketplace, know the industry trends, and be prepared to talk intelligently about the business issues that keep your clients up at night.
- Arrive early for appointments – feel the energy that comes from being ready and excited to talk with your clients about their tax situations.
- In advance of your meetings, review your notes from the prior year. Practice what you will say about tax situations relating to your clients. Anticipate their questions and prepare your answers.
- Bring a coworker to meetings. Discuss what will occur in advance, explain how the coworker should prepare in advance, dissect the meetings afterwards and point out how the advance preparation paid off.
- Don't back off from conflict if your clients or coworkers disagree with your results. If you know your subject inside out, you will have the confidence to handle

disagreements and confrontations.

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