CPA
Practice Advisor

what to do, and not do, that can streamline payroll functions and ensure compliance.

Luke Reynebeau • Feb. 17, 2017

Dos:

o Review IRS guidance on filing and document prep deadlines (https://www.irs.gov/filing/self-employed-small-businesses)

o During filing season client meetings, review 2016 payroll data and employee classifications

o Prepare your clients for 2017 federal and state tax changes (https://www.surepayroll.com/resources/blog/small-business-tax-changes-guide)

o Monitor employee and wage regulation changes that may affect clients

Do Not:

o Miss the chance to do an account review and set goals with each and every payroll client

o Hesitate to ask for client referrals during every client engagement this month, whether it be in-person, via your email signature, or through a concerted referral campaign

Payroll