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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:

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- 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

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