

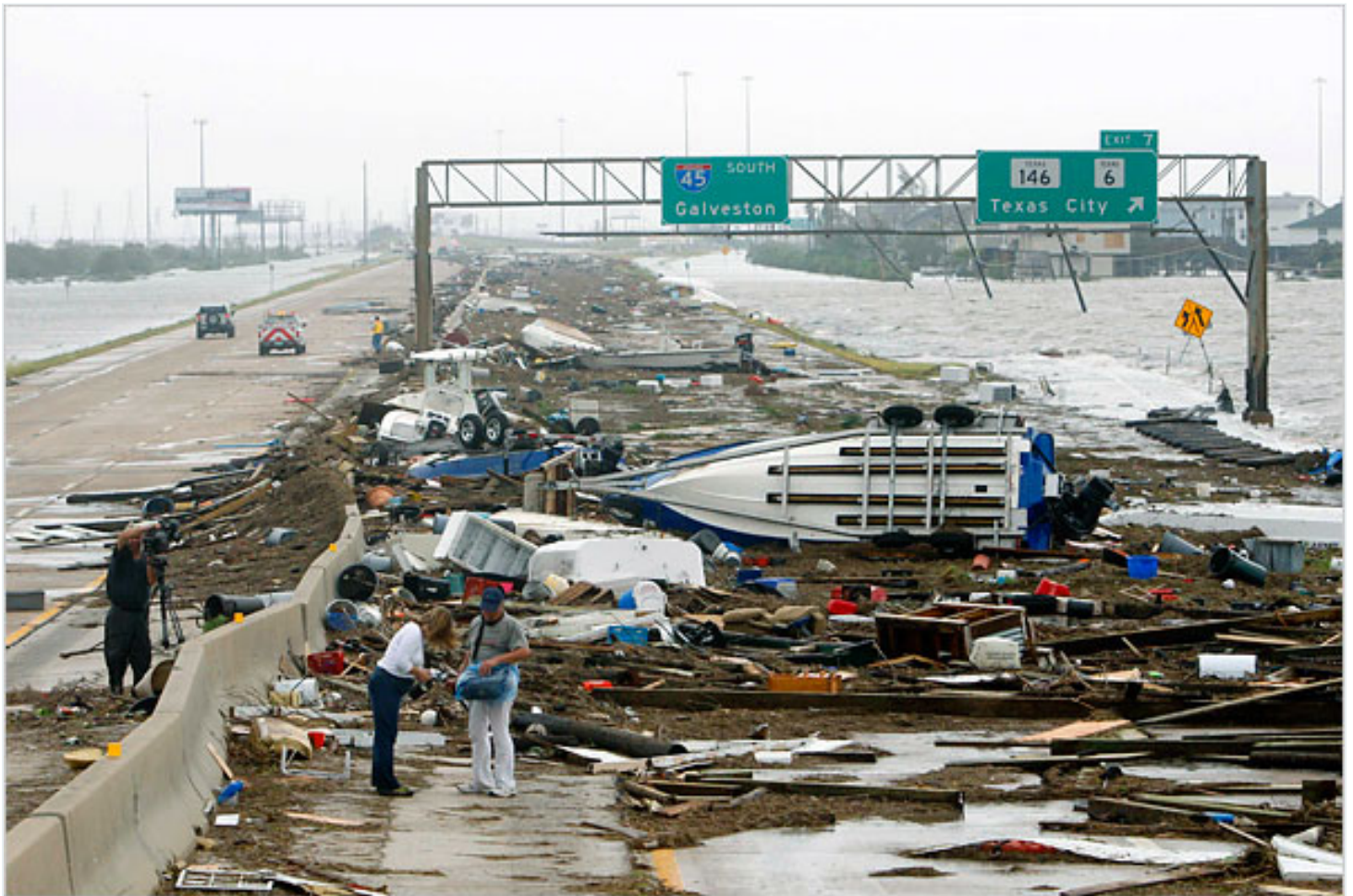
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## and clients

What can firms do to better prepare themselves for disaster? How can they carry through their trusted advisor role to help clients recover? With technology in today's environment, we all know it's easier to prepare and plan for a natural disaster ...

**Scott Cytron** • Sep. 18, 2017



It's been just a short few weeks since Hurricanes Harvey and Irma ravaged the Texas Gulf Coast, the Southeastern United States and many parts of the Caribbean. While today's predictive weather radars are more sophisticated than ever to warn residents of large and small storms, no amount of preparation ever seems as if it's enough to

prepare for even the smallest of business disruptions, let alone personal life loss and

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clients get back to business, Poulos has several pieces of advice.

“The best situation is to be proactive by planning *before* a natural disaster ever takes place,” he says. “Try to scan receipts and documentation for important purchases, and other documents such as wills and trusts, to store on the cloud, particularly if you have the only original copy that can be destroyed or lost. Take photos and videos of your home, and personal belongings such as furniture, jewelry and other expensive items that would provide losses for tax purposes.”

With technology in today's environment, we all know it's easier to prepare and plan for a natural disaster than it was more than a decade ago when Hurricane Rita hit, for example. Poulos says the biggest challenge is to be proactive and plan for a disaster, even though no one wants to experience something catastrophic.

“One of the first and most important things someone should do once they are able to access their home is to take photos of the property, vehicle and personal belongings before they start cleaning up or file an insurance claim,” he says. “Having proof of the damaged property and belongings can be crucial for providing proof of casualty losses in the event a client gets audited.”

Many practitioners feel they are immune to being involved in crisis and disaster planning, but think again. Tax and accounting professionals have the right mix of competencies and skills that would be very helpful in case a disaster occurs – from the way they analyze numbers and plan for the future to their extensive knowledge of the company's history, goals, technology and systems.

When clients are going through a crisis, they *should* turn to their accountant for help. In fact, I have found that many accountants readily offer their clients proactive business continuity and disaster planning services, which, of course, is much more useful than having to put the pieces together after disaster has struck.

A crisis can occur anytime, anywhere, and it can strike in a variety of ways. This

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## 1. Backup, backup, backup.

While this may seem obvious for some firms, I know there are firm partners and employees reading this who are scratching their heads wondering whether they *are* actually backed up. With today's technology, there is no reason a firm can't have its data backed up, redundantly, in more than once place. Include an offsite backup, along with a cloud backup.

There are quite a few cloud-based programs for backup; I use [Carbonite](#) and love it. It's affordable and completely scalable. In addition, designate someone at your firm to be the point person to keep up with backups to ensure the firm is always up to date.

While many firms are paperless, or surely deal with less paper, the firm should identify hard copy documents that cannot currently be re-created electronically. While just about everything can be electronic or paperless, we all must live with *some* paper. In a firm, this may include files, contracts and financial data. You can also develop corrective procedures to eliminate potential loss of documents, and, of course, consider paperless solutions, including scanning and cloud-based storage.

## 2. Create a crisis plan.

Regardless of size, scope or location, every business ought to have a crisis plan. And, make time to update the plan regularly. I've seen a lot of firm crisis plans and all of them are a bit different; here's a [good resource](#) from Ready.gov.

Firm crisis plans will want to have the following components in their plan:

- Contact information for employees, along with a phone tree with “captains”

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checklist, asking, “How did we do?” You can even stage a mock disaster and evaluate how the firm did.

## The Bottom Line: Survival

If you think you're too busy to actually backup systems, create a crisis plan or even think this won't happen to you, then you're doing yourself a real injustice. Not only will you *not* be prepared should something happen; you are also short changing yourself and affecting the fate of everyone at the firm.

You can make this task a little easier on yourself by delegating some of the responsibility or actions, and even doing a bit at a time. If something happens, let's hope you're prepared for the worst scenario possible. Good luck!

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*Scott H. Cytron is president of [Cytron and Company](#), known for helping companies and organizations improve their bottom line through strategic public relations, communications, marketing programs and top-notch client service. An accredited consultant, Scott works with companies in professional services (medical, legal, accounting, engineering), high-tech and B2B/B2C product/service sales.*

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