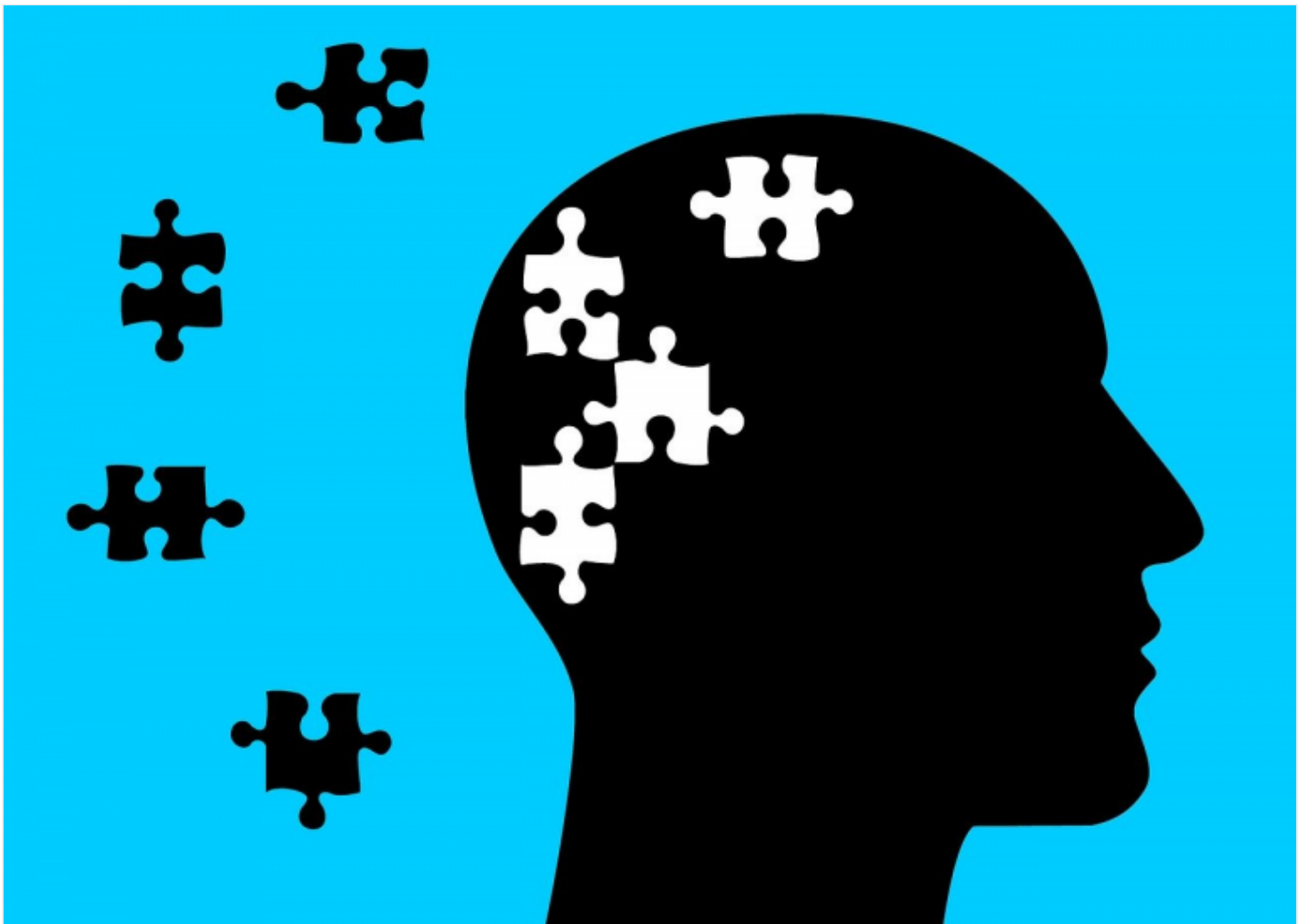


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**Jodi Chavez** • Apr. 22, 2021



Tax Day in 2021 coincides with Mental Health Month, observed each May — and while that's almost certainly a coincidence, it's a coincidence that certainly feels apt. This won't be lost on already under-the-gun tax professionals, for whom the lead-up to the filing deadline, even under ordinary circumstances, is invariably, well, taxing. And the circumstances right now are anything but ordinary.

With all of that in mind, here are three tips to help tax pros de-stress, deepen client

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Whatever approach you take, it's been a crazy year, and you need to be prepared. Otherwise, strikes right down the middle will start looking like curveballs.

## 2. Simplify, Simplify, Simplify

Take it from me, simplifying complex information and explaining technical language when asked are two things that *every* client appreciates. And while doing so is easier preached than practiced, it'll make all the difference this year. Why? Two reasons:

- Communication ensures alignment, which is comparatively less of an issue when you're meeting clients face to face. Relegated to screen-to-screen digital interactions, however, it's a different story.
- Clients will come away from the meeting feeling like they've been heard, which should increase satisfaction levels and ensure clarity around next steps. You can reinforce the latter by sharing simple takeaways — checklists, for example, or brief summaries of what was discussed — after every meeting, as well.

## 3. Self-Monitor for Symptoms of Burnout

You've probably heard of the concept of “burnout” before. It's a condition characterized by excessive stress, exhaustion and a general inability to cope. But did you ever consider whether or not you were at risk?

Right now, with tax deadlines looming on the horizon, maybe you should — because if burnout strikes, the consequences would literally be costly to your practice. [One survey](#) from around the start of the pandemic, for example, showed that mental health concerns like burnout had become the number-one cause of *long-term* work absences.

How to avoid this? A few simple tips: Take micro-breaks throughout the day (for

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If there's one thing the global pandemic has brought home for all of us, I hope it's this: health and wellbeing have to come first. These things are a lot more important than work. You should keep that in mind at all times, of course, but especially as we approach the filing deadline in May.

For now, here's wishing you — and tax pros everywhere — a value-adding, relationship-enriching and above all burnout-free Tax Day 2021!

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With more than 22 years' experience in the staffing industry, Jodi oversees the field organization and provides direction for Tatum. Jodi is responsible for continuing to transform Tatum into a data-driven organizational search and consulting firm helping clients select the key financial talent they need to execute their business strategies. Throughout her career, Jodi's entrepreneurial drive and strong business acumen have led to increased revenues, gross profit growth and improved ROI. Along with a proven track record of building high-performing teams, she brings a wealth of knowledge in strategic planning and execution, mergers and acquisitions, brand strategy, social media and multi-generational leadership.

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