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PRODUCT & SERVICE GUIDE

Corvee Launches Monthly Tax Planning Roundtable Discussion Webinars

The first event will feature firm owners Minal Barbaria, KB Tax Deviser CPAs; Erik Woodbury, Woodbury Finance and Accounting; and Jeff Trapp, The Tax Planning Pros as speakers. The event will be moderated by Andrew Argue, CPA and CEO of Corvee.

Jun. 08, 2021



Corvee, a software and solutions company serving tax and accounting firms, has announced the company is launching a Tax Planners' Roundtable webinar series. These events will be held each month with the first one, "How to Transition to 90% Tax Planning from 100% Tax Prep" taking place on Wednesday, June 9, at noon EDT.

The first event will feature firm owners Minal Barbaria, KB Tax Deviser CPAs; Erik Woodbury, Woodbury Finance and Accounting; and Jeff Trapp, The Tax Planning Pros as speakers. The event will be moderated by Andrew Argue, CPA and CEO of

Corvee. During this discussion, these firm owners will share their journey of transitioning from tax prep to tax planning and the challenges they had to overcome along the way.

“We are so excited to be able to bring such a great series to our webinar schedule,” states Andrew Argue. “Each webinar will feature special guests who can share great insight with the rest of the tax planning world. This month we will hear from experts who have each transitioned their firms from extensive tax preparation to tax planning. They will share with the attendees how they were able to pivot, how their clients reacted and what they are experiencing today as a result.”

More information and registration for this webinar are available at <https://corvee.com/tax-planners-roundtable-webinar>.

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