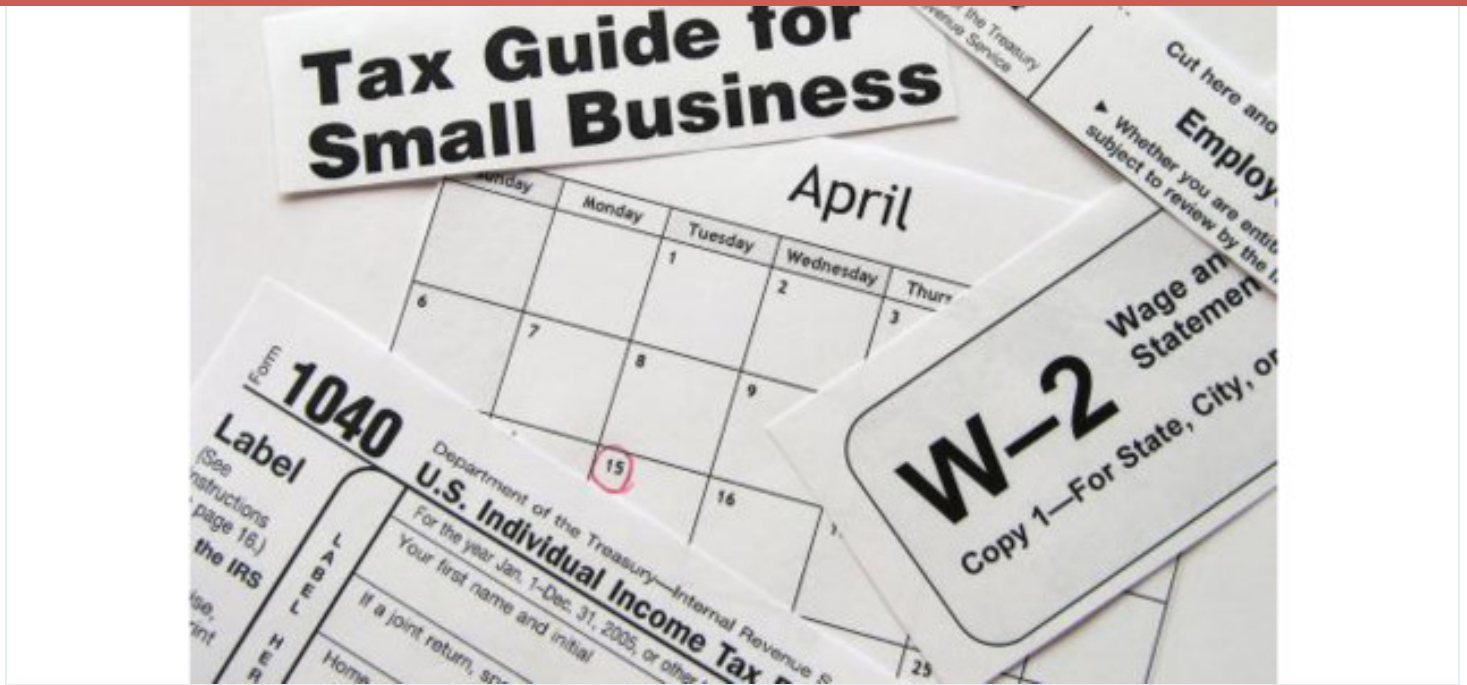


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Like 2020, the year 2021 is ending in the midst of a pandemic. Though recovery is in sight, and many businesses have long since adjusted to the chaos brought forth in 2020, there are still some challenges faced by taxpayers, and by accountants and CPAs.

The question is, how should you best prepare for this upcoming tax season, while still continuing to adjust to the new normal? Here are a few suggestions.

1. **Review your current software** – Chances are this is the last opportunity you'll have to get your files and your office in order prior to the beginning of tax season. One of the best places to start is by reviewing your current tax software? Is the application out of date? Does it still suit your needs, or have you outgrown it? Are you looking for additional features and functions that are not available on your current system? And most important; does your current system support remote working?

If you find your software is not keeping up with your firm's needs, now is the time to

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3. Increase staff – If you're typically short-staffed, consider interviewing and adding additional employees prior to the first of the year. To get started, determine where the greatest need is: do you need support workers to keep up with administrative duties or are you looking for accounting professionals to help with returns? Having qualified staff on hand prior to the tax season rush will eliminate the need to identify and onboard new employees during your busy season.

If you're not in a position to hire, consider limiting the type of clients you take on. Another option would be to outsource work to another company, but make sure the company you outsource to has been properly vetted, otherwise it can harm or even destroy valuable client relationships.

4. Communicate – Communicating with your clients regularly is important year-round, but particularly at the start of tax season. While it's important to organize your firm in preparation for the upcoming tax season, if you don't involve your clients in the process, chances are you'll still be waiting for essential information months from now. Begin by creating the proper workflow, starting with a client organizer. Make sure that your client has access to your client portal, and if you don't have one, you may want to consider getting one. Most important, make it clear what you need from your clients to get started, and exactly when you'll need it by.

5. Avoid burnout – Easier said than done, but tax season usually means late hours – whether in the office or at home. Either way, to reduce stress, consider shaking up your schedule a bit. Instead of late nights, consider coming into work early to get a jump-start on returns. Stop skipping meals because you're busy – it only makes it easier to over-indulge at your next meal. You may also want to consider offering your employees discount gym memberships or have healthier meals brought into the office, making sure you take advantage of those options as well. Taking planned breaks, getting up from your office or desk to take a brief walk, or even just stretching can help relieve stiff muscles and get your blood flowing.

While nothing can eliminate the stress of tax season, being organized can certainly

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