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By Al-Nesha Jones, CPA, MBA.

As tax professionals the last 18 months have taught us so much about the industry and our profession. Most importantly, it's shown us that change is inevitable – and often unexpected – and our clients' needs are ever-evolving. The days of only offering bookkeeping or tax preparation are nearing an end. Clients need advisory, proactive planning, and access to tax professionals remotely in the event in-person is not an option. I've noticed several pivots over the last year in a half in our industry, and I hope these changes are here to stay.

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Intuit's ecosystem of products has also allowed us as accounting and tax professionals to evolve to meet the needs of our clients through cloud-based programs and without overcomplicating our workflows – allowing more time for advisory and non-compliance work.

More Advisory Services

I've also seen a major shift to clients placing more value on advisory services. With PPP, EIDL, PUA (and all the other acronyms that came about with pandemic-related relief), clients had questions and they looked to us for answers. Clients have since become much more accepting of accounting and tax support that includes bundled advisory services because they recognize the value in having a trusted partner who can advise them on new legislation and how it impacts them.

It's important for all firms and businesses to recognize this shift and update their business accordingly. As clients are becoming more accepting, it's the perfect time to make these changes. If you're hesitant, even making the updates slowly, introducing a handful of trusted, loyal customers at a time can help get you and your team started. Advisory isn't going away, it will only build and accelerate from here.

Small Business and Marginalized Communities

The pandemic impacted all small businesses, but those in marginalized communities took a huge hit. They weren't prepared to apply for PPP and/or EIDL. They didn't have contingency plans in place. They may not have known where to go to ask for assistance, and it will take years for many of these communities and their small businesses to recover.

Small businesses are the foundation of our communities, and the pandemic has shown we need more focused efforts on minority-owned businesses to ensure they don't get further set back in times like these. Education and resources are key.

The pandemic has accelerated the technology, services, and the focus of our industry.

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Al-Nesha Jones is a CPA and the founder of ASE Group, a full-service accounting and tax firm focused on helping small business owners build strong and sustainable businesses. They specialize in making the dollars make sense through proactive tax planning, tax preparation, and year-round advisory support for entrepreneurs in the NJ/NY/CT/PA area.

She is also a QuickBooks Online Advanced Certified ProAdvisor, a member of the Intuit Trainer/Writer Network, and teaches a college-level bookkeeping course. Jones is passionate about increasing the number of small businesses in marginalized communities through education, support, and mentorship of minority entrepreneurs.

Jones believes we're all at our best when we're operating in our space of genius and intentionally making space in our lives for the 'nouns' that bring us joy. She starts each day asking "what can we do today to get our clients and ourselves more time to do what we're great at and what we love?"

Advisory • Technology

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