Don't just check the box with the tools you own. Choose the RIGHT tools that don't cause frustration. Making it easy is the key to retaining both valuable clients and staff!

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This webinar was held on Tuesday, June 21, 2022.
Sponsor: SafeSend
Duration: 1 Hour

Don't just check the box with the tools you own. Choose the RIGHT tools that don't cause frustration. Making it easy is the key to retaining both valuable clients and staff! By standardizing the experience with the SafeSend Suite, you provide one platform that clients become comfortable with at every point in the tax engagement and staff know how to use. Join SafeSend as we examine a variety of options for automating client touchpoints across the tax engagement – gather source documents, collect digital organizers, assemble, and deliver completed tax returns, collect e-signatures, send reminders, and accept tax prep fees just to name a few.

In this webinar, sponsored by SafeSend, Mike Cuffle, Product Enthusiast will:

- Explore the common points of frustration for firms and clients throughout the tax

Presented by:

Mike Cuffle
Product Enthusiast
SafeSend

Mike Cuffle, MBA, EA is a SafeSend Product Enthusiast with more than 20 years of experience serving the tax and accounting profession in a variety of roles. His diverse background includes researching and writing tax-related content for the National Association of Tax Professionals, owner of a small tax preparation business, and an on-going career in the accounting technology industry. His background gives him a unique understanding of the pain points that tax professionals face and how the SafeSend Suite can solve them by streamlining work to make the tax engagement easier for both the firm and their clients.

Gail Perry
Editor-in-Chief
CPA Practice Advisor

Gail Perry is the editor-in-chief of CPA Practice Advisor. She also speaks at many accounting events, trade shows, and webinars. Gail is the author of over 30 books (including Mint.com For Dummies and QuickBooks 2014 On Demand), and she maintains a small tax practice. Gail is a graduate of Indiana University where she earned a bachelor's degree in journalism. She returned to school to study accounting at Illinois State University, earned her CPA, and worked for Deloitte in the Chicago tax department. She has taught college-level accounting principles and was on staff for 10 years at the Indiana CPA Society as a computer applications instructor. Gail

was the publisher and editor-in-chief of AccountingWEB before joining the CPA

About SafeSend®

SafeSend's mission is to automate the tax and accounting profession with innovative, emerging technologies that help practitioners work more efficiently and serve their clients better. Progressive accounting firms and tax professionals rely on our unique and robust solutions to make their lives easier and their work more enjoyable.

SafeSend offers several foundational technology solutions for the tax and accounting profession. Our flagship offering, SafeSend Returns® is a multi-year winner of the CPA Practice Advisor Technology Innovation Award and has redefined the way accounting firms digitally assemble, securely deliver, and quickly capture e-signatures from clients for completed tax return packages. Additional tools we offer include, TicTie Calculate®, an Adobe® Acrobat® plug-in for accounting professionals, and SafeSend Exchange™, the secure, bi-directional file exchange system. Visit safesend.com to learn more about our digital solutions.

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