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## WEBCASTS

# CPE Webinar October 27, 2022: The Suite Life: Empowering Staff with Automated Processes

Receive 1 hour of free CPE credit for participating in this live webcast. October 27, 2022, 2pm ET. Sponsored by SafeSend.

Sep. 29, 2022



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**Date:** Thursday, October 27, 2022

**Time:** 2:00 PM EDT / 1:00 PM CDT / 11:00 AM PDT / 6:00 PM GMT

**Sponsor:** SafeSend

**Duration:** 1 Hour

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When the busiest and most stressful time of year is looming, how can you prevent burnout in your hardworking staff? The current lack of candidates in the tax and accounting profession makes the option of adding seasonal employees challenging and less appealing. To stay ahead of busy season, it is more important than ever to assess current processes, make necessary improvements, and consider technology tool that help staff. Join SafeSend as we discuss the current climate and explore automation solutions that can make a direct impact quickly. Future-thinking firms are most successful when they recognize past challenges, take the lessons to heart, and deploy tools and technology that will make them more adaptable in the event of unforeseen circumstances.

Clients expect you to deliver your services in a way that is convenient, collaborative, and flexible when life throws everyone a curveball. In this webinar we will introduce the SafeSend Suite and how it can automate remote client interactions across the entire tax process, including engagement letters e-signatures, digital client organizers, K-1 distribution, and signer delegation e-file form e-signatures, and collecting payment of the tax prep fee.

**Learning Objectives:**

1. Explore the benefits of using automated processes to supplement firm staff
2. Understand the new technological advances that are automating tax practices
3. Identify the top tax solutions allowing staff to digitally assemble and deliver completed tax returns from anywhere and serve clients remotely
4. Learn how to develop a client-centric approach for tax engagements and improve client collaboration

**Program level:** Basic (no prerequisites required).

**Field of Study:** Information Technology and Firm Management.

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**Presented by**



**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** is the editor-in-chief of CPA Practice Advisor. A veteran of accounting journalism, she also speaks at many accounting events, trade shows, and webinars. Gail is the author of over 30 books (including *Mint.com For Dummies*, *The Idiot's Guide to Introductory Accounting*, and *Surviving Financial Downsizing: A Practical Guide to Living Well on Less Income*), 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 Chicago for several years as a state and local tax accountant. She has taught introductory accounting and personal finance courses, and she is a former computer applications instructor at the Indiana CPA Society. Gail is a member of the AICPA's PFS Credential Committee.

**This FREE online webinar is a continuation of CPA Practice Advisor's mission to provide unbiased, independent information on technologies available to**

Special thanks to our sponsor for supporting this educational session:



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<sup>®</sup> 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<sup>®</sup>, an Adobe<sup>®</sup> Acrobat<sup>®</sup> plug-in for accounting professionals, and SafeSend Exchange<sup>™</sup>, the secure, bi-directional file exchange system. Visit [safesend.com](https://safesend.com) to learn more about our digital solutions.

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