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Oct. 18, 2022



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This webinar was held on Wednesday, November 2, 2022.

Sponsor: Wolters Kluwer

Duration: 1 Hour

If you're running a smaller tax and accounting firm, you probably don't run your business the same way large firms do. Your tech stack is probably more focused on streamlining workflows, improving project tracking, and finding solutions for customer collaboration. And while that's great for building a flexible and responsive accounting firm, it also means that your firm is less likely to use data analytics tools to grow your business — which means you're missing out.

A small practice incorporating the right strategies and tech-enabled services can set its clients up for success and the firm up for big-time growth. But how do you do it?

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Field of Study: Information Technology

Presented by



Georgia Smith is a product manager for Wolters Kluwer Tax & Accounting North America and has over 25 years of experience in tax preparation. Georgia owns and manages a tax preparation and bookkeeping business that serves individuals, small businesses, and small non-profits.

The insights that Georgia gains into the pain points of the small tax and accounting business owner helps guide her work at Wolters Kluwer, where she focuses on supporting small firms and creating the vision and strategy for the ATX product line.



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HomeTown of Liberty, PA



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.

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ability to grow, manage and protect their business and their clients' businesses in a fast-moving and ever-changing world. It means that firms can stay ahead of the pack, take advantage of new technologies, transform, and capitalize on new opportunities.

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