Don't settle for clunky solutions and processes filled with manual tasks that cause anxiety and burnout among staff.

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Sponsor: SafeSend
Duration: 1 Hour

The height of tax season is often the time when firms feel the impact of inefficiency. Don't settle for clunky solutions and processes filled with manual tasks that cause anxiety and burnout among staff. You deserve more! Making it easy is the key to retaining both valuable clients and staff and also reducing the strain of busy season.

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.

Learning Objectives:

Program level: Basic (no prerequisites required).
Field of Study: Business Management & Organization

Presented by

Joe Wroblewski is a Senior Product Enthusiast with more than eight years of experience working in tax and accounting technology. He leverages his expertise in areas such as client success, learning and development, and sales to help new and existing customers make an immediate impact in their firms using the SafeSend Suite. Since 2012, he has held many roles at SafeSend, but most enjoys helping firms design workflows that best complement their specific needs.

Gail Perry, CPA, 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

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