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## WEBCASTS

# CPE Webinar May 23, 2023: Tax Workflow Automation: Make Your Tech Investment Count

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Feb. 16, 2023



# SafeSend

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**Date:** Tuesday, May 23, 2023

**Time:** 2:00 PM ET / 1:00 PM CT / 11:00 AM PT / 6:00 PM GMT

**Sponsor:** SafeSend

**Duration:** 1 Hour

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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! Make it easy is the key to retain both valuable clients and staff and reduce 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:**

1. Explore the common points of frustration for firms and clients throughout the tax engagement
2. Understand the new technological advances that are automating tax practices
3. Identify automation solutions that were built specifically for the tax and accounting profession
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:** Business Management & Organization

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**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 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 practicing public accountants and tax professionals.**

**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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