around client organizers and source document gathering in the tax workflow process.

Jun. 21, 2023



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This webinar was held on Tuesday, July 18, 2023
**Sponsor:** SafeSend
**Duration:** 1 Hour

Join SafeSend, as they share the journey of solving pain points experienced on the front-end of the tax process and define a new way to get your firm and clients tax ready! Learn how using digital, fillable client organizers, file exchange, document

request lists (DRL), and other front-end gathering tools within the SafeSend Suite is

it easy for both staff and clients. *"We had significant usage with the source document upload feature."* – Virginia Dennerlein, Director of Operations, Sax LLP. Join SafeSend as we share ways to help your firm get tax ready and solve pain points around client organizers and source document gathering in the tax workflow process.

Learning Objectives:

1. List the common points of frustration for firms and clients throughout the tax engagement
2. Recognize the new technological advances that are automating tax practices
3. Identify automation solutions that were built specifically for the tax and accounting profession
4. Evaluate 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

**Presented by**



**Andrew Hatfield**, SafeSend Co-founder and Chief Growth Officer, leads

revenue growth, strategic partnerships, and defining SafeSend's long-

**Shirley Chen** is a SafeSend Product Enthusiast based in Commerce, Michigan. Shirley Chen is a Digital Transformation Practitioner who specializes in leading changes in the tax & accounting industry. She has a proven track record in helping firms embrace human-centric technology adoption and succeed by capitalizing on efficiency gains. Shirley is a certified Scrum Product Owner and PMC, who loves to use stories to bridge knowledge gaps and to help firms re-imagine their tax practice management. She has been working for SafeSend since 2021 and has interacted with over 1,000 firms. Her research paper on Digital Transformation was published as an editorial piece in the Journal of the Association for Information Systems in 2022. She is a proud University of Michigan alumna and football fan.

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.**

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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

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