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CPE & TRAINING

CPE Webinar September 28, 2023: Source Doc Gathering, Delivery & E-Sign Issues

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Date: Thursday, September 28, 2023

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

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Join SafeSend's Andrew Hatfield, co-founder and Chief Growth Officer, as he shares the journey of solving pain points experienced on the front-end and back-end of the tax process. Discover the fastest and easiest way get your firm and clients from "tax ready" to "finish & file" using automation. Don't settle for clunky solutions and processes filled with manual tasks that cause anxiety and burnout among staff. You deserve more!

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. 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

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Presented by



Andrew Hatfield, SafeSend Co-founder and Chief Growth Officer, leads revenue growth, strategic partnerships, and defining SafeSend’s long-term priorities and agenda. He is a recognized industry speaker and thought leader, and enthusiast for emerging technologies that impact tax and accounting firms. Andrew focuses on market dynamics, customer feedback and needs, and profession trends with an eye toward identifying new pathways to growth. For nearly two decades, Andrew has lent his automation technology expertise and deep domain knowledge of the profession to help create innovative software solutions – each providing exponential efficiency gains for tax and accounting professionals.



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.



Isaac M. O'Bannon is the managing editor and digital content manager for *CPA Practice Advisor* (www.CPAPracticeAdvisor.com), drawing on two decades of experience covering the areas of professional accounting, taxation, business productivity and consumer technologies. Prior to *CPA Practice Advisor*, Isaac was a consultant at firms in San Francisco, Denver and Tulsa, serving clients that included Logitech, Polycom, Hilti, Microsoft, the Stanford Research Institute, the University of Oklahoma's College of Engineering and other technology leaders. He is a U.S. Navy veteran.

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

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