and make features such as automatically generated Document Request Lists (DRL), automatic identification and labeling of client uploaded documents, and dynamic custom questionnaires available and easy to use.

Oct. 24, 2023

This webinar was held on Tuesday, November 14, 2023
Sponsor: SafeSend
Duration: 1 Hour

View the Archived Webinar

Join SafeSend's Andrew Hatfield, co-founder and Chief Growth Officer, as he discusses AI's ability to make getting Tax Ready easier for firms and clients. New

innovation leveraging AI will streamline the source document gathering process and

Firms know the frustration around collecting source documents and getting clients to complete a traditional, labor-intensive tax organizer, especially when much of the information may not apply. It's time to discover how AI and automation technology can help tax preparers move away from the dated traditional organizer process and eliminate manual work and frustration. Join SafeSend as we share ways to help your firm and your clients get tax ready and solve pain points around the client information gathering process.

Learning Objectives:

1. List the common points of frustration for firms and clients throughout the tax engagement
2. Recognize new automation advances and AI innovation saving firms time
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 and the overall client experience

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

Presented by

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.
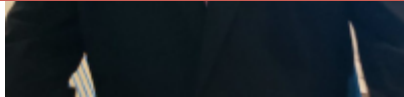
Mike Cuffle, MBA, EA is a SafeSend Senior Product Enthusiast with more than 20 years of experience serving the tax and accounting profession in a variety of roles. His diverse background includes researching and writing tax-related content for the National Association of Tax Professionals, owner of a small tax preparation business, and an on-going career in the accounting technology industry. His background gives him a unique understanding of the pain points that tax professionals face and how the SafeSend Suite can solve

them by streamlining work to make the tax engagement easier for both

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

National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: https://www.nasbaregistry.org/. For more information regarding administrative policies please contact Isaac O'Bannon at iobannon@cpapracticeadvisor.com.

Firm Management • Taxes • Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.