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Instructions

Erase client frustration with automated tax return delivery they will want to adopt.

Apr. 10, 2024



This webinar will be held on Thursday, May 16, 2024

Sponsor: SafeSend

Duration: 1 Hour

[Register Now](#)

With many technological and AI-powered advances coming to the tax and accounting profession, firms are looking to provide the best service for their clients, all while staying up to date, saving time, and cutting costs. Firms are looking for a solution that standardizes the tax workflow experience easily. A solution that offers automation tools that cater to all points of tax engagement for your clients.

The SafeSend Suite offers a straightforward, easy-to-use interface your clients will love for both individual and business returns. While offering multiple API integration options for a seamless, paperless, transition, clients and staff can gather source documents, collect digital organizers, assemble, and deliver completed tax

returns, collect e-signatures, send reminders, accept tax prep fees, and more all

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- 3. Discuss the trends happening in the industry, from AI, to collaboration, and the “Single Pane of Glass” concept.
- 4. Understand the steps needed to evaluate the best solutions for your client out in the marketplace today.

Program Level	Intermediate
Prerequisites	None
Field of Study	Business Management and Organization
Advance Preparation	None
Delivery Method	Group Internet-Based
Recommended CPE Credit	1 credit per 50-minute session
Registration Instructions	Register Online
Cost	Free
Complaint Resolution	editorial@cpapracticeadvisor.com

Presented by:



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design workflows that best complement their specific needs.



Gail Perry 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

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platform for engagement letters, fillable organizers, source document gathering, file exchange, extensions, tax return assembly, delivery, e-sign, and electronic K-1 distribution. Thousands of firms save an average of \$12K for every 1K returns delivered via SafeSend.

This end-to-end tax workflow equips firms to serve their clients with a guided and intuitive experience across all touchpoints, including automated reminders, online payment options, tax return summary—and more—all in one place. The SafeSend Suite currently supports CCH Axcess™ Tax and ProSystem fx® Tax, Thomson Reuters UltraTax CS® and GoSystem® Tax RS, and Intuit Lacerte®. Visit safesend.com to learn more about our technology solutions.



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