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CPA Practice Advisor

Today's Technology for Tomorrow's Firm

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the Hackers'

HIT LIST

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Security for a Work-From-Home World

THE LABOR LAW ADVISOR:

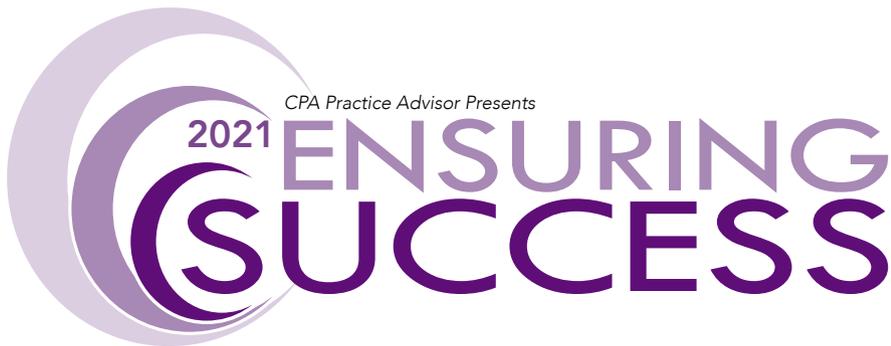
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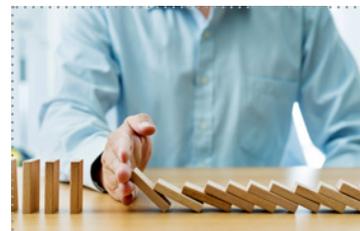
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What Do You Hear When You Listen to Your Clients?

IT'S TAX TIME and, be it virtually or in person, we're meeting with many of our clients. In some cases, it's the only time all year we will hear from them. We need to gather the appropriate financial information so that we can prepare their tax returns and, for some, annual personal financial statements. While your clients are sharing their financial activity with you, are you really listening to the information they are providing? Here are some ideas for learning more about your clients by paying closer attention to what they are saying.

Does your client have a 1099-B reporting sales of stock? Beyond recording these sales on the tax return, take the time to ask your client about stock selling decisions. Was there a need for additional cash? If so, that information might help you begin a discussion about budgeting and financial management. Or perhaps the taxpayer is using the cash to purchase other assets or help a family member. Tax and planning ideas can germinate from discussions of why items were sold. And don't forget to talk to your client about tax issues relating to the timing of decisions on selling stocks.

Likewise, if your client is investing in stocks or other assets, your expertise in the tax ramifications of owning these items might enable you to provide helpful tax-related

information to your client for ongoing ownership of additional stocks, a vacation home, or whatever the investment might be.

Did your clients contribute to charitable organizations? For many, the allowable deduction for contributions is lower than in the past, however careful planning can help a taxpayer lump itemized deductions in one year and perhaps get the tax benefit of higher contributions to favorite charities. But don't stop there, because a restricted deduction doesn't change the emotional reasons for choosing charities to support. Talk to your client about the decision-making process behind the choice of organizations to which the taxpayer contributes. You might suggest your client get more involved with the charity perhaps in an advisory or board position, or

your client might be able to help the charity connect with other potential donors by helping the charity explain to potential donors how recent changes in the tax law impact deductions for donations.

Does your client have children? Have you had any discussions about college costs, financial aid, college savings plans, and the tax implications of all of these? If not, tax time is a good idea to start that conversation and help your client plan for the future. If your client's children are already in college or are paying back student loans, be sure to discuss current COVID-related information on student loan forgiveness and employer payments of student loans, as well as options for tax credits relating to college costs.

Does your client contribute to an

IRA or a 401(k) or other tax-deferred retirement account? Here's an opportunity to discuss investment alternatives, borrowing, loan options, withdrawal requirements, and retirement planning in general. Many clients don't even mention the company retirement plan to the tax accountant, thinking it's not relevant to current taxes, so you can start the discussion by asking for information on how your client is planning for retirement.

Be sure to include questions in your client meeting about family members, how COVID-19 has impacted job security, and expectations for the future. You might find that these questions lead to additional opportunities to provide worthwhile services to your clients. ■

— Gail Perry, Editor-in-Chief

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4 TIPS for Firm Cyber Security in the Cloud

By Mary Girsch-Bock

AS MORE CPA firms turn to cloud-based applications, the need to keep the firm's data secure becomes a more pressing concern. And with the level of confidential data retained by CPA firms, is it any wonder that they remain a particularly attractive target for computer hackers?

Just for a moment, imagine the conversation you would have with your clients when you had to inform them that their personal data had been accessed from your servers due to a data breach.

In some states, CPA firms can be held liable for any cybersecurity breaches should the breach expose personal data, but even if your firm is not legally responsible, the resulting fall-out from a data breach at your firm can cost hundreds of thousands of dollars, not to mention the mass exodus of clients sure to follow.

In years past, viruses were the main threats to company computers, but hackers have become much more resourceful in recent years. The following are just a few of the threats that businesses face every day.

- **Malware** – More than a quarter of all data breaches involve some form of malware. Malware can be used to steal or manipulate valuable data stored on your computer. Distributed as an email attachment, random pop-ups and via spam, malware can take many forms, including Adware, Spyware, Trojan Horse, Viruses, and Worms.
- **Ransomware** – Ransomware is malware that affects your computer by encrypting your files, with the attacker than demanding a ransom before they will restore access to your data. Ransomware can take many forms, and has been

known to fool many people. While your first inclination may be to pay the ransomware demanded, payment does not guarantee that the attacker will ever restore access to your data files.

- **Phishing** – Another tactic used by attackers is phishing. Phishing accomplishes one of two things; it provides access to sensitive data stored on your computer, or it downloads malware, which can lead to a ransomware attack. Phishing uses very credible looking emails in the attack, with the email designed to trick you into clicking on a link or downloading an attachment. The problem is once you do, the attackers now have control of your data. Highly profitable for hackers, there are phishing kits available for purchase on the dark web. Needless to say, phishing is not going away anytime soon.
- **Eavesdropping attacks** – Because of the amount of sensitive data routinely shared between CPA firms and clients, firms can be particularly vulnerable to eavesdropping attacks. An eavesdropping attack involves the theft of data by a third party as the data is being shared between two other parties. For example, if your client is sharing tax documents with you, the third party intercepts the data as it's being transmitted. Eavesdropping happens on an unsecured network, and frequently happens when using public wi-fi, but attacks can happen

anywhere if network security isn't up to par.

If you're using a cloud-based application, you may assume that your software provider has the necessary security measures in place, so there's no need to be concerned. But it's important to remember that even if your cloud provider guarantees protection against malware or other data breaches, your firm is ultimately responsible for safeguarding your client's data.

The following are a few of the things that any cloud-computing provider should have in place. Make sure that yours has the following.

1 FIREWALLS – Firewalls serve as a barrier between your network and the public. At its most basic, a firewall should monitor all network traffic. There are a variety of firewalls that should be employed by your cloud provider including a perimeter firewall that provides additional security as well as an internal firewall that is designed to keep applications and databases separated.

2 DATA ENCRYPTION – Data encryption is a necessity, for both stored data as well as transmitted data. Because encrypted data is encoded, it prevents unauthor-

ized users from accessing and using the data in some form.

3 PHYSICAL SECURITY – Data stored on servers should always be protected. Using Tier IV data centers helps keep data safe by providing armed security that patrol the property around the clock, along with controlled, secure access to the building at all times. 24/7 monitoring using closed circuit TV should also be part of the security offered by your cloud provider.

4 MULTIPLE SERVERS – Two is always better than one, at least when it comes to servers that store data. By using multiple servers in multiple locations, your data is safeguarded against atypical disasters such as fires, floods, hurricanes, and other natural disasters. For example, if the data center storing your data is destroyed in Florida, it won't matter because your data is also stored on servers located in Colorado.

Cloud applications can make your life so much easier. But you also need to ensure that the provider you're entrusting with your customer's data can keep it safe and secure. ■



Get Off the Hackers' Hit List

Evolving Competencies for Finance Firms Today

By Jodi Chavez

ALMOST FROM THE outset of the pandemic, financial services organizations found themselves near the top of hackers' hit lists. And, at least in a few crucial respects, it's not so hard to see why. Reams of personal and financial data. Intimate institutional connections, often to much larger fish in the ecosystem. Comparatively immature IT infrastructures. Limited overall threat awareness. From the other end of the periscope, we must have looked like sitting ducks.

The good news is the extent to which that narrative is no longer true. The range of responses from financial services companies of all kinds, and the swiftness with which many have made changes to bolster both IT and accounting practices in the name of security, has been truly awe-inspiring to watch. But there's still a lot of work to be done.

In this article, I want to first briefly recap the latest cybersecurity numbers

cybersecurity right now? What are the latest numbers in the context of financial services organizations generally, and CPA practices specifically? Let's start with the numbers.

- Data breaches at CPA firms have risen by more than **80 percent** in recent years — and they've also changed in kind. For example, more than 40 percent of those breaches now represent attacks involving ransomware and/or extortion.
- Small to medium-sized accounting firms have been **identified** as particularly compelling targets for cybercriminals. Why? They have access to sensitive client data, they often serve as connectors or gateways to larger, more prominent organizations and they seldom have the advanced IT infrastructure of banks and larger firms. It's a combination that has global cybercriminals licking their chops.
- Despite the clear and present danger, not to mention the increasing frequency of cyber attacks, however, it is the exception to the rule for cybercrime to result in arrest and prosecution. In the context of identity theft, for example, only **one identity thief is convicted for every 20,750 victims**, according to analysts.

Why the seeming leniency on the part of law enforcement? The fact is, many of these criminals are based overseas. While the U.S. has extradition treaties with many countries, there are almost an equally large number — more than **76 countries**, including China and Russia — with which we do not. Put two and two together and the baseline obstacles to successful prosecution aren't difficult to spot.

None of which in any way lets organizations off the hook, of course. (If anything, the effect is just the opposite.) Given that reality, however inconsistent it may seem to potential industry targets, what can financial services firms do to shore

up their capabilities going forward? That's the topic I'll turn to next.

EVOLVE YOUR CAPABILITIES

In light of the latest developments, this may be at the dawn of an entirely new breed of finance professional: the finance-IT hybrid. These professionals will bring to the table overlapping yet separate competencies, with skill sets that intersect and cross-pollinate between accounting and IT.

Yet, while the need for such skilled professionals is clearly quite pronounced, as we have just discussed, where are hiring managers to find them? They aren't exactly out there in droves, a point which brings me to two recommendations.

First, in the interim, close collaboration between these two departments — finance and IT — is going to remain essential for best-in-class risk and threat mitigation practices today. Organizationally, this should be a focus area.

Second, there are exciting opportunities for seasoned finance professionals to start evolving these capabilities on their own, and CPA-specific training programs are one route to get there. The American Institute of Certified Public Accountants (AICPA) already offers **several**, for example.

What can you do with this sort of training? What does it look like in practice?

- Audit and assess the end-to-end state of an organization's existing cybersecurity risk management program, identifying any gaps and probing for weaknesses.
- Build out more robust controls across the finance function.
- Develop and implement advanced training to increase the organization's overall cybersecurity readiness.
- Create threat detection and response protocols, thereby empowering key

stakeholders to take action and mitigate losses in the event of a potential breach.

- Work consultatively with other business heads, providing advisory services and ensuring strategic alignment across all areas of the organization.

And that's just the tip of the iceberg. As these training programs continue to evolve and become more sophisticated, I'm excited to see how CPA practices and other financial services organizations grow and change in turn.

FINAL THOUGHTS

CPA practices, accounting firms and financial services organizations are increasingly wise to the ways of cybercriminals. They're proactively partnering with IT and business leaders to take preventative action, mitigate risk and avoid costly breaches.

In that vein, they would also be wise to view the latest developments in cybersecurity as not only an emerging threat but also an emerging opportunity. Those that are able to demonstrate advanced technical capabilities as part of their core accounting function should stand to gain a distinct competitive advantage — in fact, it could position them head and shoulders above the rest.

With more than 22 years' experience in the staffing industry, Jodi Chavez is president of Tatum, where she oversees the field organization and provides direction. Jodi is responsible for continuing to transform Tatum into a data-driven organizational search and consulting firm helping clients select the key financial talent they need to execute their business strategies.



for financial services organizations and CPA firms specifically. Next, having effectively set the stage, I'll call out a set of evolving competencies that should be top of mind for finance firms, and walk through a few ways for finance pros to action them today.

TAKE A — GULP! — GOOD LOOK AT THE NUMBERS

Just how bad is the situation with



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CLIENT EXPERIENCE FOR TODAY – PORTALS **OR** SOMETHING MORE?

EFFECTIVE DOCUMENT EXCHANGE, gathering, management, and distribution with clients is a significant friction point for many firms. Possibly because of the COVID-19 pandemic, client collaboration, workflow, and document management systems (DMS) came to the forefront in 2020. Unfortunately, many firms were not ready for the extraordinary conditions of stay-at-home orders. While I have spent most of the last year assisting firms overcome technology issues, with the common issues involving collaboration, workflow, and DMS, four more technologies were problematic. These four include Voice Over IP (VOIP), remote access, home network security, and portals.

Unrelated to all these technologies, in January, our K2 partners were planning our CPE courses for 2021. We noted that there was a widespread shift to Microsoft 365 and a considerable interest in Microsoft Teams in particular. Teams' popularity was not a surprise, based on the various meeting technologies required to effectively work from home, including Google Hangouts, Google Meet, GoToMeeting, WebEx, Zoho Meeting, and Zoom. What was surprising was the interest in using Teams as a replacement for whatever portal was in use by the firm.

Our K2 partner meeting's other unexpected outcome was our Paperless Office course's exceptional popularity, ranking among our top ten course offerings. Feedback from our attendees also tells us that it is time to move to a new strategy for document management, which I have concluded I will call Document Management V5.0 for the moment. Unfortunately, many firms are still running DMS V1.0 or V2.0 because they implemented the technology early and then never upgraded again. We will need to discuss DMS also this year. But for now, let us look at

document exchange, collaboration, and client experience.

HOW DO WE EXCHANGE DOCUMENTS WITH CLIENTS?

For ten years, we have suggested that firms use portals as the "front door" of your practice, as noted in my August 31, 2011 column and again on December 17, 2013. This thinking evolved as we were working through the RootWorks organization's design with Darren Root

and Wade Schultz, the web designer and innovator behind their efforts. Traditionally, portals were built in one of several ways. These methods included integration with a practice management system, like Thomson Reuters Practice CS and NetClient CS or GoFileRoom Portal, evolving to Onvio Firm Management.

During my 2020 review of practice management systems, I discovered by my count that 37 systems have portals and there are 23 features of portals.



While I could name all of these features and products, we are excited to review most of them in our new podcast, The Technology Labs. Other portals are integrated with DMS systems like Wolters Kluwer CCH Document and CCH Portal, CCH Axxess Document and CCH Axxess Client Collaboration Portal, Doc.It Web Portal, and Conarc's iChannel Client Portals. You can also use utilities like Citrix ShareFile and Microsoft SharePoint.

However, more familiar to CPA firms, when Practice Management, DMS, and utility methods are not used, is to use a tool specifically designed for the profession with a focus on tax, audit, or some specific capability. TaxCaddy, SafeSend Returns, Suralink, and Liscio are examples of products built for the accounting profession's purpose.

WHAT ARE WE TRYING TO ACCOMPLISH WHEN EXCHANGING DOCUMENTS WITH CLIENTS?

So, what are we trying to accomplish with your client document exchange? How do you get what you need? What techniques do you use?

- Prepared by Client (PBC) list?
- Portal?
- Organizer?
- Monthly checklist for bookkeeping services?

- Email?
- Calls (sometimes as a desperate last resort)?

And how do you keep track of it all?

- Document Management System (DMS), document storage system (DSS), DIY
- Workflow
- Spreadsheets
- Task lists in practice management

What do you want the client experience to be?

- Provide the firm what they have
- In the format they have
- Firm requests that are easy to do
- Legal eSignature easy to do
- Sign off on new projects
- Complete requirement paperwork
- One place to track everything

And how do you want your clients and your team to use the documents?

- Right content, right format, right time
- Complete, correct, concise
- With these attributes
- Easy to read
- Easy to find



- Can perform Optical Character Recognition (OCR) where needed
- Easy to collaborate
- Easy to distribute
- Retained by engagement or policy

SO, WHAT CAN WE DO TODAY?

Outside your busy season is a great time to focus on the relationship between "making things easy" and "getting things done" for your clients and your team. To get through the busy season and not go crazy, you need the following things to be true:

- Clients need to send you documents on time
- The staff has complete visibility across clients
- Who owes us what?
- When did we request it?
- Did they send that document?
- These things need to be true in tax season and throughout the year

It would be best if you look for a secure, invite-only tool where no one else but your firm and your invited clients can access the platform. Look for a clean, organized workspace with every message, client task list, and all files feeding into one place where everyone can find them without being cc'd on anything. Make sure everyone in your firm can see all the files and messages. That way, no matter who interacts with the client, every authorized person in the firm can see the documents and transactions, enabling proactive client service. Clients use cell phones frequently today, so consider obtaining a fully featured mobile experience that lets you be in contact with your clients wherever they are at so that you are never stuck waiting to get work done again.

2021 and beyond is a time of improved document exchange, client collaboration, and client experience. What type of experience are you going to create for your clients? ■



7 Tips to Prevent

TAX SEASON

IT'S TAX SEASON and you've got plenty to do. Burn out could already be happening, but you've got a long way to go before April 15. This time of year, you likely have higher stress and are going to experience some fatigue. What can you do to prevent hitting the wall? Consider these tips.

1 LOWER DISTRACTIONS

Having work interruptions is never a welcome thing, but interruptions during tax season can be especially frustrating and a catalyst to burnout. Of course, there is a higher volume of client calls and emails this time of year. It's best to delegate activities that pull you from your primary work or set aside a specific block of time each day to handle those distractions.

This way, distractions are limited and they don't knock you off track throughout the day. Turn your phone off, don't open emails, and put a "Do Not Disturb" sign on your door—whatever it takes to lower interruptions and become more productive in the limited hours you have to work.

2 HIRE HELP

Whether it's just you or your entire staff that's feeling overworked right now, a key way to prevent burnout is to hire more help. For some, that just sounds like more stress—but if you know exactly what you need and have a good hiring process in place, then now is the time to get that extra assistance. You may not find full-time support now that we're in the thick of tax season, but you can supplement your team with third-party outsourced firms as well.

Longer hours and heavier workload are normal during tax season, but hiring either full- or part-time help—even temporary help, can reduce the impact



BURNOUT

By Andrew Argue

across your firm, lessening the burden on everyone.

3 TAKE A BREAK Be looking for signs of burnout before it's too late, both for yourself and your employees. If need be, take a day off and completely disconnect. While taking a full day this time of year can seem far-fetched, some believe that a personal day off allows you to recharge so much so that you can make up for it in the days that follow.

If taking a day off as you approach burnout isn't an option, try limiting your hours on certain days. Too much overtime isn't good for anyone, no matter what time of year it is or how important the work. Make sure you leave the office at an early enough hour to unwind and get some rest before bed.

4 DECREASE TIME PER TAX RETURN If you can organize requests, questionnaires, engagement letters and payments into one organized system, it can really speed up your production. Many firms have unnecessary delays in sending and receiving signed documents, delays in processing payments, no structured onboarding process and wait until the last minute tax deadline for all files which causes a massive spike in workload.

Come up with a system and

use available technology to have an all-in-one place for these documents and requests to help you stay organized and on track. You can use tax preparation questionnaires that have tax planning questions embedded so you can prepare two services at once and this will also help you with your off-season workload. The more you can automate data collection and deliverable creation, the more quickly you can service clients and increase your firm's revenue. So focus on innovation, which will in turn reduce time spent per return.

5 STAY APPRECIATIVE This may seem silly, but no matter how much work you've got on your plate, the right frame of mind is to be appreciative of the work. With the economy the way it is, many are out of jobs or having a tough time. Meanwhile, some accounting and tax professionals are swamped with more work than they can handle. In short, burnout is a problem, but at the same time, it's a good problem to have.

So, take a moment each morning to be thankful for the mountain of work in front of you. Having an attitude of gratitude is a natural stress reliever. This also goes for the atmosphere you create inside your firm. Tell your employees how thankful you are for their contributions. Words of appreciation and

thankfulness can go a long way towards relieving tension during a busy season.

6 EAT WELL Most of us are pretty aware that eating healthy foods can impact energy levels. Likewise, eating too much sugar, fast food or less than ideal choices can lead to feeling sluggish and tired. That's why it's important, for example, to keep raw vegetables and fruits on hand as opposed to boxes of cookies or candies. You might pre-pack a healthy lunch from home so you don't feel the need to swing by your local burger joint when you become hungry in the afternoon.

For many, dietary choices tend to get more chaotic the busier they get. This is why it's important for tax professionals to make it a point to eat well even while they're swamped with work. The better you eat, the more clear-headed you'll remain, which makes it easier to get through the work. Letting your diet slip during your peak time of year is a recipe for burnout.

7 LEVERAGE NEW TECHNOLOGY For many, tax season seems like the absolute worst time to even consider investing in a new software program, but if you get the best technology on your side, it can definitely speed up your workflow.

Whether it's tax preparation, client collaboration or tax planning software, tools like these exist to take stress off of your firm by automating processes. If you have outdated technology, this is likely a cause of stress for your employees, and an upgrade would be a big relief.

Busy season is exactly the time of year you need the best software the most. Technology can potentially help you work faster with fewer mistakes—and thus decrease your stress. So, if you haven't already, do some research on the best software out there for tax and accounting firms, and then get started.

All these tips, taken together, can collectively help alleviate your stress, prevent burnout and help you become more profitable this tax season. You'll still likely experience some fatigue—because it is tax season after all—but that doesn't mean you have to hit a wall. Take care of yourself and your firm with the above tips, and April 15 will be here before you know it! ■

Andrew Argue, CPA, is the CEO and founder of Corvee, a software and solutions company serving tax and accounting firms. At Corvee, Argue works to help tax and accounting firms increase their revenue and profitability through tax planning.

Security for a **Work-From-Home** World

IF YOU DIDN'T begin 2020 relying on **cloud-based technology** to allow you to work from anywhere, you almost certainly ended it that way. With a global pandemic forcing us to avoid group gatherings, some offices went remote for the whole of the year and aren't thinking of returning anytime soon. Even if you plan to **reopen** fully once it's safe to do so, it's unlikely you'll ever go back to an environment where work-from-home (WFH) isn't an integral part of your operations. As such, it's probably time to ensure that your **cybersecurity** meets your current needs.

There are many ways to ensure that your sensitive data is kept safe from prying eyes, and the best plan of action will vary depending on the nature and size of your organization. That being said, there are a number of strategies that are worth exploring for all firms. You're probably doing some of the items listed below, but it doesn't hurt to brush up, especially as your team members are working from more places and more devices than ever before.

EDUCATION

No matter how robust your suite of technological defenses are, humans will always be a vulnerable part of the equation. Keeping your team informed of standards and best

practices will go a long way in keeping your data safe. Team members should never use public wifi or plug into public USB ports, like the ones you find in the airport. And they should never, ever open unsolicited links, whether they come via email, social media, text, or any other format. If they receive a dubious email, such as one purporting to be from a bank that doesn't feel quite right, it's always better to exercise caution. You don't want to end up with a phishing scam on your hands. You can even run **fake phishing scams** in order to test the vigilance of your team. While you're at it, it wouldn't hurt to encourage your **clients** to engage in these practices as well.

VIRTUAL PROTECTED NETWORKS (VPNS) AND MULTI-FACTOR AUTHENTICATION (MFA)

VPNs and MFA are two of the easiest ways to add enhanced security layers to your firm. A VPN requires users to sign onto a specific network in order to access certain applications. In other words, a user wouldn't be able to access their company data by simply being online; they must sign onto your network in order to do so. MFA requires users to verify their identity in at least two ways as a means of ensuring that a single lost password can't compromise a network. Under the best MFA systems, at least one authenticating factor will be randomly generated



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and time-sensitive, such as a code sent to a phone or accessed through an app like **Duo**. Stacking these technologies, making a VPN accessible only through MFA, makes them even more secure.

ZERO TRUST SECURITY

If you want to have the highest level of security currently available, you may choose to go with a Zero Trust architecture. In a Zero Trust system, no devices are ever considered to be inherently safe. All devices and users must prove their authenticity at all times, use the most updated patches of all software, with security assessing threats in real-time. If you want to read more about the specifics of Zero Trust, you can follow the work of **John Kindervag**, the thought leader who coined the term. Microsoft also offers a helpful **diagram** explaining the system.

The most important part of any security system is making sure it is implemented effectively and used by all users at all times. There's no reason a cloud-based operation shouldn't be as secure as a terrestrial one, but in both cases, you have to remain vigilant and stay up to date in order to avoid catastrophe. Data breaches are a threat to life of any business, so there's no better time than now to take a look at your cybersecurity. ■



Discover Two Key New Features in QuickBooks Online

THANKS TO THE cloud, if there is one thing that is consistent about QuickBooks Online, it's the ability to evolve the product. Based on the feedback of CPAs and accountants who want to work with their clients as efficiently as possible, Intuit is continually improving existing features and adding new ones that enhance workflow.

Here is an overview of two of our latest evolutions: The new Chart of Accounts experience and Custom Tags.

NEW CHART OF ACCOUNTS

A new Chart of Accounts experience is rolling out in QuickBooks Online and is designed to help your clients not only correctly categorize transactions, but also provide guardrails to help eliminate clutter and errors from being created in their account.

"Accounting professionals and their clients will love this new feature because it reduces the guesswork faced when recording transactions in the Banking Center and Transactions screens in QuickBooks Online," said Heather Satterley, CPA, MSI, founder of Satterley Training & Consulting, LLC. "This feature has been thoughtfully designed and created to help relieve the anxiety clients experience when categorizing transactions, as well as help reduce the amount of reclassification work their accountant partners must do at the end of a period."

According to Satterley, the user experience offers three key benefits:

- **A standardized Chart of Accounts** is applied to a new QuickBooks Online company based on the industry and tax entity type selected in the new company setup wizard. This eliminates the guesswork when setting up and structuring the Chart of Accounts.
- **Client users are only able to add a sub-account** to the existing pre-

defined parent accounts and will not be able to create new parent accounts unless adding a new bank or credit card account. While accountants will still be able to add parent accounts, sub-accounts keep the Chart of Accounts orderly and provide the ability to track granular details that clients need to manage their business. The client-created sub accounts can also be collapsed into the parent accounts on reports.

- **Accounts are suggested when a client records a new transaction** in the Transactions tab.

"These user-facing features will drastically improve the reliability of the accounting data and reduce the amount of cleanup," says Satterley. "The good news is that accounting professionals will have the same experience we have now that will provide the flexibility to structure the Chart of Accounts according to preference."

For example, users can add parent accounts, turn on account numbers, and import a Chart of Accounts. Intuit is also adding entity types and industries over time and will include predefined account structures that align with their selected industry and entity type. Planned industries include real estate/property management, law firms, contractors, manufacturing/wholesale, and restaurants/food service, among others. Planned entity types include sole proprietorships, partnerships, C corporations, S corporations, and not-for-profits.

The new Chart of Accounts experience began rolling out to a limited number of new users in February 2021, and will not be retroactively applied to any existing QuickBooks accounts. For example, clients who set up QuickBooks Online accounts themselves, and identify their business as a sole proprietor and a service-based business may see the new experience. Whereas accountant users who create a new company for their clients via QuickBooks Online Accountant will not.

CUSTOM TAGS

Users can now start tracking the most important information about their business with help from Custom Tags in QuickBooks Online.

Why should accountants be aware of tags? Tags are customizable labels that let your clients track their money however they want in order to gain deeper insights into their business. This enhances the role accountants play as a trusted advisor because they can now help clients understand their business in much more detail.

For example, an accountant can add tags to money in and money out transactions, such as invoices, expenses, and bills, as well as where the business made and spent money. Tags don't impact the books; they are simply labels that allow users to track different types of data without having to touch the Chart of Accounts.

To get started using tags, go to "Banking" in the left navigation, then click on "Tags." Check out this video tutorial or learn more here.

These new features will help accountants to enhance and better manage their client relationships. Discover them today. ■

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The Covid-19 Pandemic and WORKER MENTAL ILLNESS

IN MARCH 2020, shortly before the COVID-19 pandemic began, I wrote an article on the impact of mental health issues (<https://www.cpapracticeadvisor.com/21130927>) in the workplace and the lack of attention that the subject received at the time. The article noted that according to the National Alliance on Mental Health, 43.8 million people experience mental health issues in any given year. Approximately 10 million experience a “serious mental illness,” one that substantially limits one or more major life activities. These numbers include millions of workers in U.S. workplaces. At that time, the estimated economic cost from mental illness was estimated to be in excess of \$100 billion per year.

Those circumstances prevailed before the COVID-19 pandemic turned our world upside down. We then began a time of mandatory lockdowns, the shuttering of churches, schools, and many businesses. We were subjected to restrictions on travel and even everyday interactions with one another. The economy suffered massive job losses nearly across the board. Many of those who lost their jobs have all but given up hope for some light at the end of the tunnel.

It may yet be some time before we see the full effects of the pandemic-related changes to our daily existence on our collective mental health. While the increasing availability of effective vaccines has put us on a slow path to ending the pandemic, the end is still at least months away. We have already begun to hear about the psychological impact of months of school closures on many school-aged children. A recent report cited a 31% increase in mental health visits to emergency rooms among 12 to 17-year-olds. Sadly, even suicides have been reported. In Chicago, the country's third largest school district, and in other parts of the country as well, there finally appears to be some limited progress on returning the children to the schoolroom. Unfortunately, the mental health issues conceivably precipitated by school closures could have long term effects on these children.

Many parents have had to confront perhaps even more stressful circum-

stances. In addition to caregiving difficulties, they have had to deal with the fear and anxiety about the risk to themselves and their families over possible exposure to COVID-19 at work. Uncertainty about workplace changes, the future of their jobs, and the ability to provide for their families are certain to take their toll on workers' mental health.

Workers in essential and non-essential industries alike have been laid off by the millions. The unemployment rate is currently 6.3%, an improvement from the high of 14.7% in April 2020, but still approximately twice the pre-pandemic unemployment rate, when employers in many industries were desperately seeking additional employees. Employees in most industries were benefiting as wages were being increased in an effort to attract applicants.

The impact of the sudden reversal of fortunes on the mental health and well-being of many affected workers has been and will continue to be devastating. Many of the millions laid off will have no job to return to when the pandemic ends with their employers have been forced to close their doors permanently. These laid off employees have been forced to provide for their families only a fraction of what they earned before, provided through unemployment benefits and stimulus checks. If more than 40 million people develop mental health issues under normal conditions, what can be expected from these unprecedented and stressful circumstances?

Mental health conditions number in the hundreds and while it is near impossible to speculate when and what specific mental illness may manifest itself, given what workers have had to endure for the past year, it would seem that the stress, anxiety, and uncertainty would result in some form of depression for many. In fact, even without the trauma of a pandemic, major depression is the single most common mental health illness in the U.S.

Innumerable symptoms of conditions classified as mental illness could impact an employee's ability to perform the essential functions of their job. In many cases the illness manifests itself in conduct, behavior, or performance issues that affect co-workers, as well. Given the likelihood that such issues may become more prevalent as a result of the pandemic, employers need to be more vigilant of what is occurring in their workplace.

Employers often become aware that an employee may be suffering from a mental condition that is affecting them and the workplace through reports from fellow employees. In most cases, some problem behavior or incident triggers concern among co-workers. A major change in personality, argumentative behavior, lack of engagement with others, or other uncharacteristic conduct may be signs of a problem. Sometimes it is the employee's supervisor that becomes aware of a problem when having to respond to a complaint about an incident involving



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the employee. Given that such mental health issues are almost always protected disabilities under the federal American with Disabilities Act (ADA) and similar state laws, an employer must proceed cautiously in attempting to address these issues. Medical privacy rules similarly require discretion in addressing any and all employee health conditions.

The EEOC has stringent standards regarding what and when an employer may ask an employee regarding the employee's mental health. The four circumstances under which an employer may inquire into an employee's mental health condition are the following: 1) After a job offer has been extended, assuming all applicants in a given job category are asked for the same medical information; 2) When an employee has requested a reasonable accommodation; 3) When the employer is engaging in affirmative action regarding persons with disabilities; and 4) When the employer has objective evidence that an employee is unable to perform their job or poses a safety risk because of their condition. Problem workplace conduct that implicates a possible mental health issue would likely satisfy this last criteria.

Ultimately, and perhaps most importantly, employers must show empathy and make available professional support and resources for employees suffering from mental health issues. The goal is to help them address their condition and hopefully resume contributing to their own success and by extension, the company's success. ■



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Stop Selling: *Who Needs Help?*

DOES ANY OTHER part of the job illicit more disdain than selling? For accountants, selling is about as natural as a cat taking a bath. But our practices cannot survive without new clients or expanding our services among our current ones.

Let's consider leaving sales behind in 2020, along with the rest of the chaos. Instead, think of a future where we help rather than sell.

By providing solutions to new prospects and current clients, we focus on their problems and challenges—rather than our own anxieties to hit a number or fulfill some obtuse obligation.

By shifting into the mindset of solution providers, we become consultants and facilitators rather than worrying about sales. But to make this shift, we are called to embrace the idea of probing our clients more deeply than their taxes or uttering, "What can I do for you."

After all, they may not know what they don't know.

THE SOLUTION PROVIDER

Our role is changing, and we have talked about this before in many articles. We are moving away from looking backwards to becoming their forward-looking advisors.

This transition means we come to learn the client's business, so we can anticipate what is next on their horizon—preparing not only tax solutions, but other ways they might stay ahead of the inevitable. What clients do not want a dashboard offering trends and some sort of predictive analytics, for instance? Our clients have problems,

and they are looking for ways to solve them. Who better than you to research and rally on their behalf?

This is the key pivot you need to make. How often do we find that a salesperson is pushing us to buy something we don't want simply because they have only one product to offer? They are limited by the features and benefits of a one trick pony, and even if that person senses we do not need what they have to offer, there is little choice but to hawk that single product.

As a trusted advisor and with unique knowledge of a client's business, you are in a position unoccupied by any other.

Build upon this role and unique knowledge to provide clients with solutions. This is where true value rests. Interestingly, clients may not know what it is they even need or what the threats may be short- or long-term. They are busy being an entrepreneur, driving revenue, fighting costs, and holding onto valued key employees.

Not every client needs a dashboard. This is about understanding the challenges each client may face on a daily basis and how can you help each client solve them. That is what they truly need, and it is how you will remain relevant in a world where the competition is fierce for keeping anyone's attention.

THE COMFORT ZONE

With your mind open to the idea of "help" rather than "sell," you are in a frame of mind to get in front of your clients and prospects without broadcasting any pressure or hard sales tactics. You come from a place of magnanimity and respect: A professional they look forward to seeing, rather than finding excuses to put off until another day.

Next time you connect with one of your clients, set aside five minutes during the conversation to ask them, "What is the biggest challenge you are faced with that you never think to share with me?"

They may take a minute to formulate what to say and how to say it. Let that silence reign. Let them speak first to fill that silence. That silence is the sound of a new beginning.

Let them drive the conversation as you remain naturally curious. Perhaps you'll find you can offer a solution to some part of their problem—or you know someone who else who can. Either way, you have succeeded by opening a door to a new dimension in your relationship. You are a trusted advisor, the professional unafraid to talk about things that may have nothing to do with lining your wallet. Business people appreciate that. After all, you do too, right?

Resist the urge to make everything

about your firm or services. Listen. Focus on understanding where things stand today—and how they got here.

TRUE NATURE

Like peeling an onion, sometimes people need to peel back many layers to get to the actual problem. For example, if they mention turnover is the biggest problem, is it because a number of employees are leaving for better pay across the street? Or is it really the monotony of the work—which may lead you to thinking about their lack of an inventory management system?

Perhaps this client started small. Yet, they still rely on paper records to track an increasingly complex inventory process. They are burning people out, doing everything by hand, and the best people conclude this is madness and go to greener pastures. In this example, your client does not need to keep raising wages. She needs an inventory management system.

Our roles have never been so important. Luckily, we do not need to be sales people to sell being resourceful or experienced. We can evolve into better helpers more easily than better sales people. By helping our clients understand the true natures of their problems, then finding solutions to those problems, we deepen these relationships without getting them dirtied in a sales routine.

So, who can you help today? ■

Finance Employment Trends in the COVID-19 Era

EVEN AS COMPANIES have adapted to the new business environment, it's far from business as usual. The pandemic forced a sea change in the work environment for most companies, including with recruitment. However, research for talent solutions and recruiting firm Robert Half's *The Demand for Skilled Talent in the COVID-19 Landscape* found many employers are still hiring for on-site and remote accounting jobs, and candidates with in-demand skills remain hard to find. Unemployment rates for some accounting and finance positions remain well below the national average.

To meet hiring needs and retain key employees, companies are adopting new practices. And as staffing and management strategies change, employers face new challenges.

REDEFINING WORK

One of the key drivers compelling the change in staffing and management strategies is the dramatic shift in where and how we get work done.

■ **Remote work is the new norm.** In a Robert Half survey, 77% of employees reported that they've been working from home since the pandemic began. Perhaps more important, 63% said they realized they can do their job from home, and 60% reported improved work-life balance due to the lack of a commute. So it's no surprise 74% said they'd like to telecommute more when shelter-in-place restrictions are lifted. There's growing evidence that productivity has remained the same as or even improved over pre-pandemic levels, so employers may want to consider keeping some work-from-home options.

■ **Remote hiring and onboarding might stick around.** Over half of employers (53%) in a separate survey said they'd hired full-time or temporary workers remotely during the pandemic, and 75% of senior managers said they'd conducted online interviews and onboarding since moving to remote work. Hiring managers and human resources professionals are seeing benefits to the practice, including faster hiring and more efficient onboarding of new employees. Expect many employers to continue these processes remotely, even after most employees return to the office.

BOOSTING EMPLOYEE MORALE

Unexpected, dramatic change — like the abrupt transition to remote work — can cause a dip in morale. And certainly, many employees and managers have struggled to adjust to the new reality at times.

Despite the advantages of working from home — including flexible schedules, higher productivity and more room to come up with innovative solutions — many workers are uncertain about the future, which can lead to lower morale. And many managers are concerned about employees suffering burnout as they juggle their jobs and personal responsibilities, and sometimes take on additional projects and duties from laid-off or furloughed coworkers. In fact, 88% of managers in a Robert Half survey revealed that they're concerned about retention, and 47% cited employees' heavy workloads as the main reason.

It can be hard to improve morale when you're managing a remote team, but it's critical. In the short term, low morale can affect the quality of employees' work, and in the long term, it can create a difficult work environment that encourages top performers to leave.

■ **Show workers that they're valued.** Some ways companies used to show appreciation to employees, from free snacks to on-site gyms, are out of the picture right now. That makes employee recognition more important than ever. Low-cost awards and spot bonuses are great, and regularly reassuring employees that their work is critical to the organization's goals goes a long way. So does sincere appreciation for a job well done.

■ **Focus on wellness.** Firms can also help employee morale by promoting wellness perks like free webinars and programs about stress management, meditation and coping with uncertainty. Managers can also encourage workers to take their paid time off. Even if travel is a no-go, taking a day or two to simply relax at home can help employees recharge.

■ **Pay top performers well.** Of managers who said they're worried about retention in the survey noted above, 39% cited salary reductions or freezes as the main reason for their concern. It may seem like there aren't a lot of jobs out there, but there are **opportunities for high performers.** If you aren't meeting or exceeding what other organizations are paying for similar work, your most valued employees may consider moving on.

HIRING IN A NEW ERA

Currently, **accounting and finance teams are focusing** on accounts receivable and collections, accounts payable and disbursement management, cashflow projections and treasury management, financial reporting, and Sarbanes-Oxley and internal controls. As a result, employers are seeking professionals to support day-to-day accounting needs, compliance and reporting requirements, and demands related to lending programs.

CPAs, controllers, auditors, analysts, full-charge bookkeepers and staff and senior accountants are in demand. Because of the need to adapt to remote work and further uncertainty, firms are emphasizing soft skills when hiring accounting and finance professionals, such as the ability to work independently, a positive attitude, flexibility



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and strong collaboration skills.

Due to pandemic-related downsizing and layoffs, there are a lot of experienced accounting and finance professionals looking for work. And although that makes it easier to recruit strong candidates, it makes other aspects of the hiring process more challenging. The shift to **remote hiring** also requires a few changes in recruitment strategy:

■ **Cast a wider geographic net.** Now that most accounting and finance professionals are working remotely, you can consider candidates from other physical areas. In a Robert Half survey, 61% of senior managers said that they've advertised fully remote jobs since the pandemic hit, and 60% reported expanding their search geographically to access a wider candidate pool.

■ **Don't forget about passive job seekers.** Yes, there are a lot of active job seekers out there. Though some of the best candidates might still be employed — but open to a change if the right opportunity came up. A good recruiter can help you reach these professionals.

■ **Consider promoting from within.** Has someone on your team really stepped up during the pandemic? Think about promoting them. It's good for morale and provides stability by placing someone with institutional knowledge in a leadership position.

There's no question that the COVID-19 pandemic has redefined how we work and caused accounting and finance managers to rethink their recruitment, staffing and retention strategies. The changes may have been sudden, but many of them are ultimately leading to increased efficiency and productivity — and very well might be here to stay. ■

Developing a Social Media Crisis Communication Plan *By Becky Livingston*

WHEN IT COMES to social media risk, you might think about hacking and incorrect/inaccurate company page posts. But, that's not the only kind of social media risk. Here are some others.

- Automated posts with a third-party tool gives hackers the ability to corrupt the automation and send out messages that look like yours. The remedy? Monitor the application(s) often.
- Weak passwords are especially important for corporate accounts. The remedy? Use a combination of numbers and letters, both upper and lower cases, and change them every 90 days.
- Who actually has access to your accounts? Be cautious about how you login to accounts, e.g., use my Google account, because if the third-party app is compromised, those credentials could also be compromised. The remedy? Quarterly, check admin authorization for any changes and avoid logging in with another account, e.g., Facebook, Google, etc.

RISK MANAGEMENT

It is hard to define risk, especially if you are a person who plays by the rules. I often recommend clients do the following activity with a group of people.

1. Create a Risk Matrix Chart, where the left side represents the likelihood the event will occur. The top represents the severity or impact the action will have on the firm.
2. Think about potential risks your firm faces and the measures to put in place to prevent it or address it when it happens. This is the fun part! Brainstorm ideas with other people. No idea is too trivial. Outline the list of threats

- or vulnerabilities.
- 3. Identify the systems you have in place to address those threats or vulnerabilities.
- 4. Define a measurement or likelihood (the left side bar in the chart) of the risk occurring.
- 5. Choose the level of severity the threat's impact has on your brand/company.

EXAMPLE

An employee accidentally releases a small number of client names on Facebook, but no other information was shared.

- Likelihood is high since it already occurred. Vulnerability is lack of training.
- The severity is negligible to marginal depending on your firm and/or if the clients are in a regulated industry, think medical or legal.
- Actions to take could range from making note of the error and moving on, to contacting clients, and/or adjusting workflows as needed.

Now consider if that person released first name, last name, email, address, and/or personally-identifiable information (PII). Would that increase the risk's severity?



Would that have a greater impact on your firm? How would you remedy that situation?

When you're drafting your risk assessment, try to imagine each of the potential variations. List them in the matrix, along with the controls, its likelihood, and the potential impact on the firm.

REMEDIES

Once you've identified the risks, now's the time to identify remedies. Consider remedy combinations to use in your plan.

For example, in the risk example an employee posted client names, the remedies might include items 4 and 6. But, if additional information was posted, including PII, then a more aggressive remedy is needed, such as 4, 6, 7, 9, 11, 13, 14, and/or 10 and 16.

Identify the remedies, including some of those below, and place them in a Crisis Response Grid.

1. Stay silent (in some cases this is the right thing to do)
2. Social media manager responds (vs. the posting / junior staff)
3. Blocking the offender on the platform
4. Removing the offending content

5. Official statement is made.
6. Compliance is notified and responds.
7. Executive team is notified and responds.
8. Blog post or a video is created addressing the issue.
9. Creation of a dedicated phone number and/or email address for those impacted.
10. A PR firm is consulted.
11. Send an email blast to all customers notifying them of the incident.
12. Issue a public apology.
13. Create a crisis FAQ.
14. Create a dedicated customer complaint page, forum, or phone number.
15. Take the conversation offline.
16. Pause all scheduled content.

WAYS TO EDUCATE STAFF

Now that you've identified risks, created an action plan, and written a process, now's the time to share it with staff and consultants. Here are a several ways to accomplish that.

1. Host lunch-n-learns
2. Post social media office hours
3. Send social media "amplification" emails
4. Create a social media channel within the company
5. Send updates to employees & post on the intranet
6. Develop training videos

In the end, your goal is to create a social media crisis communication plan that's right for your firm. If you'd like a step-by-step plan, download the Risk Management Primer. ■

Games

WE KNOW YOU don't work 24/7, even though sometimes it seems like it. When you take off your work hat, do you put your phone aside, or do you wind down by planning a few games? This "Apps We Love" article focuses on games, and the members of the *CPA Practice Advisor* community have generously agreed to share their favorite games that they play on their phones. We all need a little respite from busy season and bad weather!

Jackie Meyer, CPA, CTS, CTC, founder at Meyer Tax, said, "A guilty pleasure of mine, and many colleagues I know, is **Two Dots**. Keeps your mind busy and shows how you stack up to your Facebook friends!"

Samantha Mansfield, founder at Samantha Mansfield LLC, recommends, "**Sudoku** and **Unblock Me** - I have always liked puzzles, so these 2 apps are fun when I have a couple free minutes. Unblock Me has a multi-player option, but I like the relax mode."

Jeremias Ramos, CPA, tax manager at Withum and editor-in-chief of The Daily CPA, opts for using his free time for learning: "Not sure if it counts but I use **Duolingo** to practice my Spanish."

Donny Shimamoto, CPA, CITP, CGMA, managing director, IntrapriseTechKnowlogies, LLC confessed, "Humm, ok I guess this my 'coming out' as a gamer. I am a regular player of **Mobile Legends Bang Bang**. It's a multi-player online battle arena (MOBA) where two teams of

5 people battle against each other across a broad map. You can choose from an assortment of heroes to play and each hero has specific skills or powers. I like it because the games will generally be between 8 to 20 minutes, so for a break, I can play one or two games for a mental break and then go back to what I was going. Every game is different because you get paired with different people using different heroes so I never get tired of it."

Liz Mason, CPA, CEO and founder, High Rock Accounting, told us, "My favorite phone game app is **PEAK**. Mostly because it's based in science. It's definitely fun and keeps my brain off of work."

David Almonte, CPA, CGMA, financial reporting and analysis manager at Amica Insurance, said, "This will sound pretty nerdy but my favorite apps I utilize for fun outside of work are **Fidelity** and **Yahoo Finance** as investing and the stock market are huge passions of mine since I was a little kid. Games specific, I am usually



playing **WSOP (World Series of Poker)**, **Hoop Stack** or using the new **Oculus** app and headset with the kids (amazing if you have never used virtual reality)."

Caleb Jenkins, EA, CQP, leader of client accounting services at RLJ Financial Services, Inc., said, "I love to play games to wind down – my favorite is **Sudoku** but I'm also learning to love **Spades**."

Elizabeth Pittelkow Kittner, CPA.CITP, CGMA, DTM, vice president of finance and human resources at International Legal Technology Association, told us, "I like to play **Words with Friends** to connect with family and friends in a fun and competitive way."

Roslyn Banks, EA, founder of Adelaide Rose LLC, said, "I have two - my old faithful is **Spiderette** on the Solitaire App (a version of Spider Solitaire). New since the pandemic is **Fishdom**. I am addicted to the pearl tournament challenges and holiday themed upgrades each month. I also love the themed fish tanks in the game, I let my children spend the prize winnings picking out different fish and decorations in the app."

Randy Johnston, CEO and co-founder of Network Management Group, Inc., and executive vice president at K2 Enterprise, looks at information for fun, "I'm pretty boring with this. My 'games' are apps that let me look at flights, plants, and wind: **Flightradar24**, **iPlants**, and **Ventusky**."

Jeff Wilson II, CPA, PFS, CFE, CGMA, CDFA, principal at The W2 Group, LLC, told us, "Favorite Online games to wind down... **Uno** with my son.. or **Spades**."

Marjorie Adams, CEO at Fourlane, Inc., said, "I love **Ramsay Dash** or **Cooking Craze**. They make me work my memory skills while also fine motor skills so it really helps me wind down my brain. The other is **Lumosity** for brain teasers. This makes me feel less like I'm playing a game and more like I'm exercising my brain!"

Blake Oliver, CPA, marketing director for Jirav, said, "Amidst the existential dread of busy season, nothing is more appropriate than the 8-bit retro arcade classic, **Crossy Road** (crossyroad.com). When it feels like everything is coming at you all at once, it's nice to take control of your destiny as the fabled chicken crossing the road."

Nikki Winston, CPA, senior finance controller for Modern Life, gaming and consumer support at Microsoft, CPA exam instructor and coach, and host of the WERKin' Mommas podcast, shared her favorite brain games: **Boggle**, **Spades**, **Words with Friends**, **Elevate**, **Angry Birds 2**.

Stacy Kildal, founder of Kildal Services LLC, shared this: "**Upwords!** I usually have games going with 4-5 people, and Gail Perry beats me every time :) My sister, Kristen, and I play **GamePigeon** pool all day, every day. At least once a day one of us is texting the other: 'It's your turn.'"

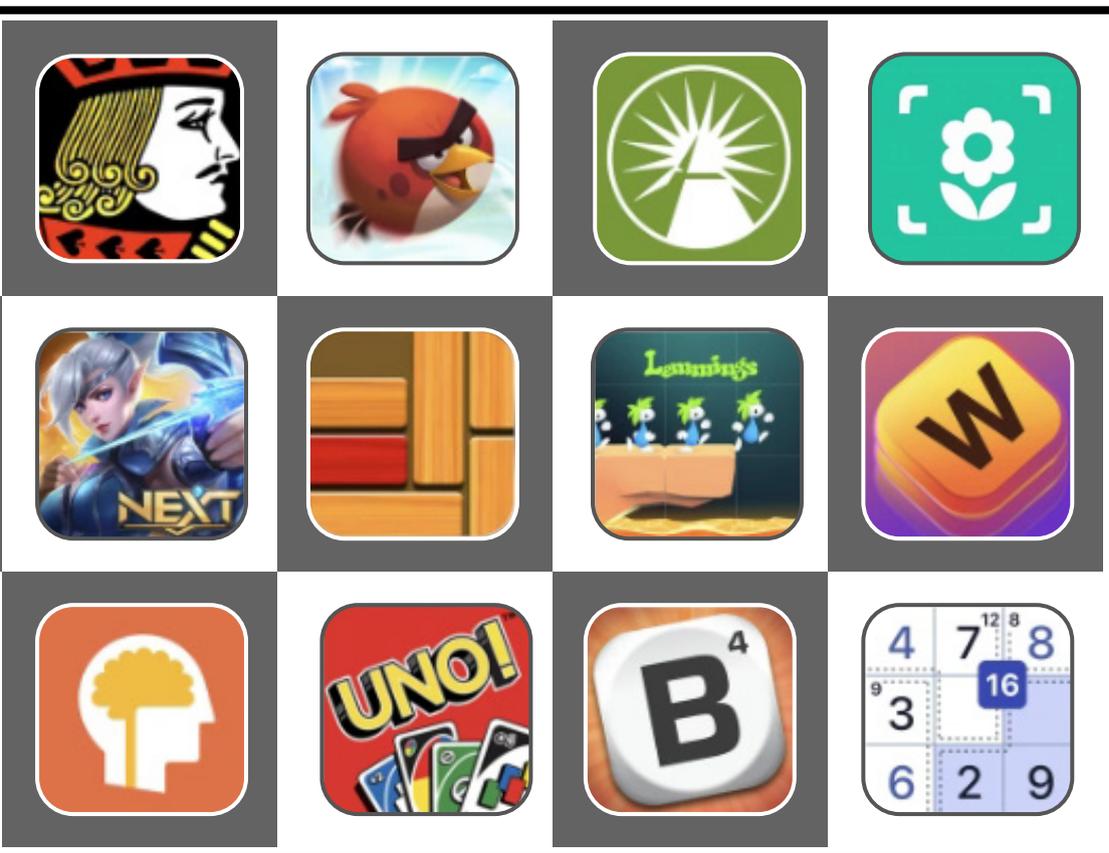
Kari Hipsak, CPA, CGMA, senior manager at Association of International Certified Professional Accountants, said, "I typically haven't used my phone to play games, but COVID has changed that! One game I like to play from time to time is called **Logo Quiz**. It shows logos with identifying words removed and the player has to correctly identify the logo. I probably never gave marketing enough credit based on how many I can identify without even realizing I was aware of the company or product."

John Higgins, CPA.CITP, strategic technology advisor, owner and co-founder at CPA Crossings LLC, confessed, "I don't typically play games on my phone. I am more of a YouTube junkie. I have started exploring **FanDuel** recently because online gambling is now legal in Michigan. You can bet on virtually any aspect of any sporting event for as little as \$1. I am not promoting it, but I am finding it very interesting. The amount of advertising they are doing for this on TV during sporting events is incredible."

Mark Brooks, investment manager at Syngenta Corporate Ventures, shared his favorites:

- **Lemmings** - I used to play this game on a x86 computer when I was younger, and now it's on iOS! A fun, quick, and relatively low level puzzle solving game.
- **Chess** - there are several of these on iOS. Humbling to get beat often by a phone.
- **Mini Metro** - another puzzle/strategy game where the player designs a subway system to move passengers. Levels get challenging quickly.

Gail Perry, CPA, editor-in-chief at CPA Practice Advisor, added, "Yours truly has a few favorites as well. I'm hooked on **Upwords** and **Words with Friends**, and I've evolved to **Killer Sudoku**. I also enjoy **Boggle**, **Hearts**, and (because I'm from Indiana) **Euchre**."





5 Reasons to Conduct a Retreat in 2021

By Jean Caragher

MANY CPA FIRMS conduct annual retreats to keep them on track. With the pandemic, more firms need to consider holding a retreat to help them prepare for their future. Taking into account what we've learned over the past year, here are five reasons to conduct a retreat in 2021.

- **Establish or reaffirm your firm's vision, mission and core values.** Your vision is the description of your future firm, which is communicated internally only. What will your firm look like two or three years from now, e.g., revenue, size, locations, niches, services, remote workforce, and use of technology? Your mission is a brief statement of your firm's basic purpose. Why do you do what you do? Hint: It's not about the money. Your core values are the essential and enduring beliefs of your firm, which should guide and inspire. What core values do you truly believe in? Clear and well-articulated core values will attract to your firm people whose personal values are compatible with your firm's core values. In the age of COVID and other societal issues, it's more important than ever for you to be clear about what your firm stands for.
- **Create or update your firm's marketing plan.** Developing your marketing plan requires you to ask: Where are we now? Where do we want to go? How do we get there? The pandemic showed us

how quickly life and business can change, and our need to be nimble. Your marketing plan is the road map for your firm's growth. It enables you to make revisions as circumstances change. Without a plan, your marketing activities are haphazard and ineffective.

- **Build your firm's niche specialties.** I have been a niche marketing fan for decades, and agree with what I hear and read about the importance of building niche specialties now. Niche marketing is market segmentation, or focusing on a particular industry or service. In which areas do you have a critical mass of staff and clients? Do you have partners who are famous in a particular area? What unique skills and expertise do your team members have? How have your clients in specific industries been affected by COVID and how can you help them?
- **Develop new services.** The pandemic has also impacted the type of services your clients need you to provide, e.g., cash projections, debt restructuring, inventory management, data analytics,

M&A consulting, valuations, technology consulting, and cyber security to name a few. Are you prepared to offer these services? What talent or company do you need to acquire or establish a joint venture with in order to deliver it? How can services be packaged and brought to market for your client base? What services will your clients need in the future?

- **Build your firm's brand.** As written in a prior CPA Practice Advisor article, your brand name conveys a set of expectations and associations and conjures up the personality of your firm. Simply put, it is who people think you are, from the way a person answers the phone, to the way you do business, to the look of the invoice. It is more important than ever to build your brand and deliver a consistent message to the marketplace.

Let 2021 be the year you help prepare your firm for the future by conducting a retreat. Whether in-person (following CDC guidelines, of course) or virtual, I'm confident it will be time well spent. ■

*Jean Marie Caragher is president of Capstone Marketing, providing marketing consulting services to CPA firms. She is the author of **The 90-Day Marketing Plan for CPA Firms: How to Create the Roadmap for Your Firm's Growth and Gear Up for Growth: The Marketing Trends Manual for Accountants**. For more information contact her at 727.210.7306 or jcaragher@capstonemarketing.com.*

Stay 3 Steps Ahead: *ACTIONABLE TIPS TO HELP YOU PREPARE FOR A TURBULENT TAX SEASON*

By Jodi Chavez

LET'S FACE IT: No one expected 2020 to go the way that it did. And while most businesses are certainly in better shape than they were this time last year, it's unrealistic to think that low overall productivity during the first half of 2021 isn't going to result in setbacks and challenges this tax season.

That's what we're in for, and forward-thinking tax professionals are putting in the work ahead of time to be fully prepared. Meanwhile, many business leaders and finance leaders, on the other hand, are likely wondering what they can be doing in turn.

Fortunately, I've got some helpful tips to share that should help you get there. There are a lot of "watch-outs" to be aware of, red flags to avoid as well as specific actions you can take that will help your business gear up for what promises to be a turbulent tax season. Here are three that are top of mind.

1. DON'T LOSE SIGHT OF DEADLINES

While most of our schedules look a little bit (ok, more than a little bit) different these days, that isn't an excuse to take a lax approach when it comes to deadlines and scheduling. Whatever method works for you — Microsoft Excel, Google Calendar, pen and paper — it's imperative to keep track of timelines this tax season. That's true for small businesses, and even more so for corporations.

Bear in mind, the IRS has not issued an extension of the filing deadline as of this writing, which means the deadline remains April 15, 2021. Companies can still request extensions, of course, but those can come with costly penalties. Unless you manage the schedule perfectly, in fact, doing so can put you on the hook for any number of penalties, as well as the payments for interest.

Actionable next step: Brush up on the IRS 2021 tax schedule, and don't skip anything that might apply to your organization. This is required reading.

2. UNDERSTAND THE TAX IMPLICATIONS OF PAYCHECK PROTECTION PROGRAM (PPP) LOANS

The Paycheck Protection Program injected some \$659 billion of much-needed liquidity into small businesses' bankrolls, shoring up their payrolls and preventing the unemployment numbers from climbing beyond what were, at that time, already sky-high figures. In the heat of the moment and at the height of the pandemic, end-of-fiscal-year tax implications may not have been the first thing that recipients of these loans considered.

Well, now they have to, and it needs to happen fast. The potential tax ramifications are too complicated to break down or solve for you in this short blog, but I can point you to the right resource.

Actionable next step: Head on over to the Office of the Treasury's website to check out the IRS's interim final rule on loan forgiveness requirements for PPP.

I predict the demand for strong, experienced finance leaders who can navigate the C-suite, effectively build consensus and deliver on strategy will be at all-time peak levels.

3. THINK THROUGH THE ALL-VIRTUAL LOGISTICS

Any seasoned finance leader will bring to the table a wealth of experience working closely alongside auditors, accountants, consultants and others as tax day nears annually. But what about virtually? Honestly, this isn't something all that many can say they're truly, utterly and completely prepared for.

But that shouldn't be a source of anxiety.

Just start preparing early, and establish the right communication channels and cadence for you, your team and any other stakeholders involved in the tax planning, preparation and filing processes. I think the biggest challenge, unfortunately, will be for small business owners who are relatively green, and who may not understand everything they need to provide. It's a challenge that can get amplified when everything is digital (and be sure to think about potential cybersecurity vulnerabilities, too).

Actionable next step: Does that sound like you? No worries — you've just got some homework to do, and that starts with closely reading and analyzing the IRS's Form 941 page for small businesses.

LOOK AHEAD WITH GREATER CONFIDENCE

Hopefully, the tips and actionable guidance I've shared in this blog have shed some light on a complex subject, helped alleviate your concerns and eased any feelings of uncertainty — because, hey, we've all dealt with way too much of that lately. As you gear up for tax season, it's also a good idea to assess your strengths and weaknesses organizationally. This year, perhaps to a greater degree than ever, I predict the demand for strong, experienced finance leaders who can navigate the C-suite, effectively build consensus and deliver on strategy will be at all-time peak levels. And for finance-savvy software professionals, ditto. Yet given the all-virtual context, how will companies in need right now actually go about finding them?

I think I'll have to save that one for my next article. ■

With more than 22 years' experience in the staffing industry, Jodi oversees the field organization and provides direction for Tatum. Jodi is responsible for continuing to transform Tatum into a data-driven organizational search and consulting firm helping clients select the key financial talent they need to execute their business strategies.



AICPA News is a round-up of recent announcements from the American Institute of CPAs.



Business Execs More Optimistic on Economy, But Inflation Fears Grow

With the promise of expanded pandemic-related relief and an improving vaccine rollout, U.S. business executives are taking a more optimistic view of the U.S. economy for the coming year, according to the first-quarter AICPA Economic Outlook Survey. The survey polls chief executive officers, chief financial officers, controllers and other certified public accountants in U.S. companies who hold executive and senior management accounting roles.

There's a downside, however, to the prospect of a more open-throttle economy: a greater risk of inflation. Business executives' concerns about inflation grew from 24 percent to 44 percent, quarter over quarter, the highest level it's risen to since the end of 2018.

■ To be sure, the lingering impact of the COVID-19 pandemic continues to predominate as a concern. While the percentage of business executives who expressed optimism about the U.S. economy rose from 37 percent to 47 percent this quarter, that still means the majority remain pessimistic or neutral. More than three-quarters (76 percent) of survey takers say the pandemic has had a negative impact on their organization, with one-in-five describing that impact as significant. ■

SKILLS FINANCIAL PLANNERS NEED TO SUCCEED

The pandemic has presented challenges to planning firms and clients alike. Earlier this year, thought leaders in the financial planning space gathered online for the AICPA's 2021 Personal Financial Planning (PFP) Summit to discuss best practices for serving clients, leading firms, and caring for themselves. The Summit is an annual event that goes beyond technical planning sessions to focus on what successful firms are doing differently.

This year, Summit attendees were asked to share their experience from the past year and thoughts on how the financial and economic uncertainty due to COVID-19 has impacted the future of financial planning. Attendees noted that work-life balance alongside maintaining and promoting firm culture have been the

two leading challenges for their practices throughout the pandemic.

And looking to the future, the vast majority of attendees say it will be more important for financial planners to manage their clients' emotional state moving forward than it has been in the past. And to be successful in the future, the top 3 most cited skills planners will need, in addition to technical skills, are emotional intelligence, interpersonal communication, and adaptability.

- Core Values and a Core Purpose Are Essential
- Support Clients Through Changing Life Priorities, Not After
- Client Perspectives & Motivations Help to Uncover Their Philanthropic Journey ■

Read more at: <https://tinyurl.com/5ak27t2m>

AICPA Proposes New Auditing Standard to Enhance Communication

The AICPA Auditing Standards Board (ASB) has issued the exposure draft (ED) Proposed Statement on Auditing Standards (SAS) Inquiries of the Predecessor Auditor Regarding Fraud and Noncompliance With Laws and Regulations (NOCLAR) to amend SAS No. 122, as amended, section 210, Terms of Engagement.

The standard requires immediate past auditors and presumed successor auditors, once management consents to the past auditor responding, to communicate about potential NOCLAR situations. Examples of NOCLAR situations include, but are not limited to, noncompliance with tax or pension laws and regulations.

"The Board's overall objective is to help auditors properly understand

potential issues in determining whether to accept an engagement," said Jennifer Burns, CPA, AICPA Chief Auditor. "The proposed standard is designed to further the public interest by enhancing communication between past and potential new auditors. A refusal to consent by the client would be a significant red flag that the auditor would consider in determining whether to accept the engagement."

The proposed SAS aligns with the International Ethics Standards Board of Accountants (IESBA) standards which became effective on July 15, 2017. It narrowly amends AU-C section 210 in **AICPA Professional Standards** to require an auditor, once management approves communication between auditors, to inquire about suspected fraud and matters involving NOCLAR. ■



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4 KEYS TO SUCCESSFUL TECHNOLOGY PLANNING

TECHNOLOGY IS INGRAINED in virtually everything accountants do to run their firms and serve their clients. To take advantage of opportunities and position your firm for long-term growth, you need a good technology plan. When most of the firm is focused on busy season, it's an excellent time to focus on technology planning. IT's priority during busy season is to keep all of the firm's existing technology running smoothly, handle issues quickly and prevent downtime. But beyond those immediate needs, the IT team often has time to plan for upcoming projects to ensure they can hit the ground running after April 15.

MANAGE EXPECTATIONS

One of the problems IT teams run into with their technology plan is that many firm leaders and administrators don't truly understand how different IT projects may be intertwined and how long they'll take.

For example, say a firm wants to change its practice management system, moving from an on-premises solution to the cloud. Firm leaders may not realize how much planning and time a project like that takes. Your IT team needs to:

- Vet available options and make a selection
- Create a full inventory of all of the firm's data assets that will be impacted and scrub that data to ensure a clean move
- Understand how other applications will be affected by the new system
- Onboard, migrate and train employees to use the new system
- Work with the old and new solution providers to address data mitigation efforts
- Ensure you have measures in place to secure data from loss or errors during the migration

That's likely not something you can decide to do in July and have up and running before the fall deadlines. However, it is possible to meet that deadline if the IT team can start the planning process now and be ready to kick it off in earnest once busy season is over.

PRIORITIZE PROJECTS

Another hurdle to effective technology planning is prioritizing projects. We use what we call the "puppy analogy" to talk about technology planning. You have your small dogs, medium-sized dogs and Great Danes. If you have Great Danes, you can walk one at a time without issue. If you have small dogs, you can walk a few at a time.

However, anyone who's brought a puppy home knows that even small dogs can be a lot to manage when they're puppies. Every project – large or small – has its puppy stage, and some puppy stages are longer than others. Data manipulation, clean up and transfer are the puppy stage of a project, and they take a lot longer. Any technology project that impacts the firm likewise has a longer puppy stage. So it helps to be realistic about what you can accomplish at any given time and space out those Great Danes and puppy stages.

SEEK OUTSIDE HELP

So how do you plan for and prioritize those projects? It helps to have a technology assessment from an outside facilitator.

Something we often hear from firms is that they have trouble building consensus among the leadership team. Different people have their own agendas or are only thinking only about their own department, which hinders progress. When you

bring in an outside facilitator, you have a neutral third party leading visionary discussions with the team. This encourages active participation and improves buy-in to develop one core vision.

A technology assessment can:

- Educate partners on technology trends in the profession and the required level of investment for different projects
- Recommend strategies to increase success and help make your firm future-ready
- Identify significant technology objectives for short-term and long term action
- Ensure your technology plan support the firm's overall strategic plan
- Help you evaluate applications and integrations
- Assess your IT governance, workload and staffing model
- Review current technology infrastructure and processes

CREATE A 3-YEAR PLAN

A technology assessment led by an outside facilitator can also ensure that you make a plan, complete with timelines and responsibilities. This tends to increase commitment to projects. It also ensures that when someone insists we need to add a new project to the list, the IT department can say, "Great, which existing project in the plan do you want to scrap?"

We've worked with firms who tried to conduct their own technol-

ogy assessment and roadmap, only to find that dates keep shifting and deadlines aren't met, which pushes projects past the ideal timeline for proper planning and execution. This can throw the overall roadmap off and decrease success.



Creating a three-year plan ensures:

- You give your team adequate time for project planning
- You identify potential roadblocks and determine strategies for overcoming challenges

Once again, an outside facilitator can help by holding people accountable for meeting deadlines and providing change management strategies to increase buy-in across the firm.

So what IT initiatives do you want to do this year, next year and beyond? Now is the time to start planning and prioritizing those projects. Priorities may change, but you can revisit your plan quarterly to ensure you're on track and make adjustments. Remember, this doesn't have to be a do-it-yourself project, and you don't need to reinvent the wheel. Seek outside expertise to bring in some much-needed perspective and increase commitment. ■

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CPA Practice Advisor



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IN EVERY ISSUE

APPS WE LOVE

Reference Apps

AICPA NEWS

A round up of recent association news and events.

SPECIAL SECTIONS

- Who's Who in Accounting Software
- Readers' Choice



ON THE CALENDAR

- Mar. 28 Palm Sunday
- Mar. 28 Passover Begins
- Apr. 1 April Fool's Day
- Apr. 4 Easter Sunday
- Apr. 13 Ramadan Starts
- Apr. 15 Income Tax Deadline???



ON YOUR TIME

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