

Leveraging tax season

# Improving client engagements

Tax season is the busiest time of the year. However, there are ways to leverage this period to improve client interactions.

## Conduct client reviews

Before tax season, tailor your services to each unique client by conducting personalized reviews of their financial situation. You can offer actionable insights for their specific needs by analyzing their financial statements and tax returns. You can guide them in expense tracking best practices, and assist in process streamlining. This personalized approach can increase client satisfaction and create opportunities for cross-selling related services like bookkeeping or ongoing financial management.

## Understand your clients

Tax season isn't just about past finances; it's an opportunity to discuss future financial planning with clients. During meetings, explore their long-term goals like retirement, investments, or business expansion. By weaving these discussions into your tax season interactions, you can establish your firm's staff as versatile financial advisors.

## Offload busywork

Finding time to invest in clients during the busy season is challenging. Outsourcing can fix this. You can see improved engagements and focus on value-added services. This is where Taxfyle comes in. Whether it's tax prep or bookkeeping work, we can connect you with licensed CPAs and EAs, all nationwide.



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