Best Practices Discussion

NEW ENGLAND
TAX SCHOOL
FOR
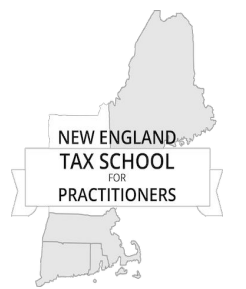PRACTITIONERS

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1 Hour Best Practice Discussion

- Show of Hands and Q & A
- Handling Staff
- Handling Information
- Circular 230
- Security
- Handling Clients

NEW ENGLAND
TAX SCHOOL
FOR
PRACTITIONERS

Staffing

- Where do we find them?
- Training to move on?
- Checking in and supporting
- Know limitations—and build
- Define duties

Staffing

- Understanding confidentiality
- Internet policy
- Encourage ideas
- Program access/passwords
- "The terminator"

Handling Information

- Engagement letters! (and disengagement letters)
- CRM
- Appointments?
- Paper
- Email
- Process

Handling Information

- What is your process?
  - Missing Information
  - Getting Paid
  - Delivering the Return
  - Getting Signatures

Circular 230

- Terminology to describe your designation
- Negotiation of client check
- The client's decision for gray area
- Oops
- Competency

Circular 230

- Taxpayer Copy
- Retention of returns, signatures, docs
- 8275 vs 8275R
- Penalties, Penalties, and more Penalties—why are we still doing this?

Circular 230

- 7216
- Notary Services
- Fees
- Client Records
- Conflict of Interest

Security

- File handling
- People (not just staff)
- Locking files, doors, office
- Dual factor authentication
- Internet (especially out of office)
- WISP
- E & O

Handling Clients

- Time management
- Payment/signature timing
- Your knowledge (inventory) and time are valuable
- Mea Culpa
- Responsibilities

Handling Clients

- Responsibility
  - Confidentiality
  - Filing
  - Amendments
  - Children
  - Parents

Handling Clients

- Review prior year
- Offer options
- Best practice tools for client
- Additional services/availability – cost?
- How to refer

Networking

- Get together
- Podcast
- Facebook
- Email!, Please don't call
- Cheryl@ebpi.com
- Info@mtsfp.com

Handling Clients

- Draw YOUR line
- Due Diligence
- How to fire

Have a Great Tax Season

Or at least stay sane 😊