



Tax Season Preparation Checklist

TaxPro is COMMITTED to ensure your tax season readiness! Here's your checklist:

Personnel

- Hire the proper amount of staff(if applicable) and determine availability to ensure coverage over the tax season.
- PTINs should be obtained or renewed through IRS by all tax preparers.
- Hire seasonal receptionist/administrative assistant(s).
- Employment documents (applications, I-9, W-4, etc.) should be completed for all new employees.
- Employment Agreements should signed by all tax preparers (including non-compete, non-solicitation & confidentiality provisions).
- Write the employee schedule for at least the first month.



- Hold or schedule pre-tax season meetings: one with your tax office staff and one with your office managers.
- Train all new associates.
- Train all new preparers on tax software and on your policies and procedures.
- Make sure all preparers are informed of the changes to the tax law for the upcoming season.



Tax Operations

- Send letters to clients to encourage them to come in early to have taxes prepared before January 31st
 - Email tax organizers and cover letters to complex return clients and scheduled appointments with them.
 - Set fees and charges for the new tax season.
 - Review and updated policies and procedures.
 - Establish Refund Transfer bank relationship if applicable.
- Set-up e-filing system.



Office

- Sign lease for all locations.
- Take inventory of all maintenance issues and either fix or create an action plan for repairs before the season begins.
- Make sure all signage is properly lit and in good working order.
- If you are leasing a mall office, ensure that it is properly set-up and ready to go.
- Order office supplies and updated inventory.
- Arrange for phones and utility to be operational for all tax office locations.
- Clean office interiors and windows.



Equipment

- Make sure all computers are in good working order (purchased new ones if necessary).
- Update all computer software.
- Arrange to have computer support personnel for any issues during the season.
- Purchase any necessary additional equipment.



Marketing

- Contact previous clients for business this season.
- Write and/or send out newsletters.
- Prepare a content plan for your website and social media sites..
- Schedule seminars out in the community.
- Create and print fliers, marketing materials, and brochures.
- Create an internet marketing plan to include Google and/or social ads.
- Purchase any advertising (newspaper, direct mail, TV, radio, sponsorships, etc.).

We are here to assist you with any of these items that pertain to your business setup. For consultation or any assistance you can visit our website at atmtaxprosolutions.com.

To Your Success!