



Managing Your Tax Season, 3rd Edition

Edward Mendlowitz

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Is tax season at your firm a head-long scramble to the finish line? Do you want to start your next tax season with a system that reflects thoughtful planning and training?

Get fresh insight into tax preparation—and very likely result in significant improvements to your current system. You will learn to analyze your existing tax season system and target problems so that work will be more efficient, errors will decrease, and personnel, including you, will feel less stressed. Most importantly, a well-run tax season will make your clients happier and more loyal.

Every firm has a tax season system, whether documented or not. Tax season management expert Edward Mendlowitz shares specific ideas for improving each aspect of your system, including how to

- Staff creatively with seasonal staff, interns, and by outsourcing
- Maximize the effectiveness of the tax organizers you send to clients
- Communicate effectively with clients about the value of your service
- Use pre-year-end planning to develop tax and financial planning opportunities
- Empower your preparers to do more return work
- Make reviews run smoothly
- Conduct a post-tax season assessment of your process
- Bill for the real value of your return preparation—and even increase your fees

Numerous sample checklists, letters, charts, and Excel tax comparison worksheets will help you implement this guidance in your next tax season. Having a world-class tax department is possible for every firm, and this resource will help you make that goal a reality.

Topics Discussed:

- Improving tax season system
- Tax return preparation processes
- Managing seasonality issues
- Staffing solutions
- Getting the most out of technology
- Year-end planning for tax clients
- Staff tax training program
- Assignment scheduling
- Client appointments
- Preparation and review
- Billing
- Determining fees
- E-filing
- Extensions
- Tax audits Client satisfaction, retention and referrals

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Georgetta Watson:

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Michael Ogden:

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