

DECEMBER✓ TAX PRESEASON CHECKLIST

IRS Tasks ✓

- Apply for new EFINs (if applicable) online via e-Services at www.irs.gov.
- Register and/or renew PTINs with the IRS online at www.irs.gov/ptin.
- Familiarize yourself with new laws, credits and other topics that could affect your clients.

Bank Tasks ✓

- Find out the requirements needed to be approved to offer Refund Advance to your clients
- Read in depth about the Refund Advance Product and how it may affect your clients (Availability Fees, Interest, Default, etc.)
- Register with a bank. To find banking partners visit SFP Works visit <http://www.swiftfp.com/financial-products>
- Understand current IRS e-filing requirements by visiting <http://www.irs.gov/for-Tax-Pros>



Software Tasks ✓

- If you have not yet renewed your current SFP Works Professional Tax Software, we advise you do so.
- Install SFP Works Professional Tax Software by calling in to our support.
- Test the software to ensure full functionality.
- Familiarize yourself with new SFP Works features and functionality
- Set your fee amounts

Operational Tasks ✓

- Test your computer or office network and upgrade as needed
- Test your printers
- Prepare your office filing system and research other backup system
- Order office supplies





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Training Tasks

- Familiarize yourself with tax law changes and preparer compliance.
- Train your staff on software Functionality, Electronic Signature Pads, Handheld Scanners, Document Manager.
- Tax Theory.
- Office Systems and Processes.
- Encourage your staff to follow us on social media for Tax Updates and support messages.

Marketing Tasks

- Plan marketing program for existing and new customers
- Order posters, postcards, and customer giveaways. JPS Print designed print templates available at jprintshop.com
- Plan tax season promotions
- Update or perform maintenance on store signage
- Increase storefront visibility now - keep interior lights on, hang banners and window posters, balloons, etc.
- Schedule pre-season appointments for prior year customers
- Email / text message / postcard / phone blitz
- Send "What to bring to your appointment" checklist



For More Information:



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