

FEBRUARY ✓ TAX PRESEASON CHECKLIST

IRS & Bank Tasks

- Evaluate check stock and pre-paid debit card inventory; order additional stock, if needed.

Software Tasks

- Evaluate all fee and billing schedules and update accordingly based on clientele and competition.
- Continue to familiarize yourself with all SFPLink and SFPWorks software updates and releases as they become available.

Operational Tasks

- Monitor store volumes and adjust hours of operation and schedules accordingly.
- Create tax preparer work schedules for the month.
- Monitor all Federal and State rejects and ensure taxpayers are contacted promptly for quick resolution.
- Consider tax preparer incentives and contests to generate friendly competition - prizes could include a dollar amount bonus per tax preparer.

Training Tasks

- Plan to review all appropriate tax law changes, itemizations and Schedules with tax preparer staff after peak week to prepare for late-season client returns.
- Watch e-mail, Facebook, and Twitter for SwiftFP Tax Updates.

Marketing Tasks

- Make your storefront "loud"- use banners, balloons, or window paint in front of your store; place wind-feathers, yard signs, or sign shakers near the street to draw attention to your location.
- Continue your store marketing plans. Modify as necessary based on clientele and competitive environment.
- Execute a client referral campaign using the referral coupons in the SFPLink or SFPWorks software.
- Consider a mail, call, or text campaign to customers whose returns are "on-hold", offering a discount on tax preparation to get them back to complete the return.



