

JANUARY✓ TAX PRESEASON CHECKLIST

IRS & Bank Tasks ✓

- Register with a bank. To find banking partners with SFP Works visit swiftfp.com/financial-products
- Verify that you have received and inventoried all check stock and smartcards from bank partners.
- Become familiar with the process for ordering marketing kits and additional check stock from your bank, if needed.

Software Tasks ✓

- Ensure all fee and billing schedules have been updated accordingly.
- 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.

Operational Tasks ✓

- Test all systems to make sure office, computers, printers, Internet and network setups are complete.
- Prepare tax preparer schedules for the month.

Training Tasks ✓

- Run practice returns in the software to ensure fees match expected pricing.
- Continue to have preparers run practice returns in the software.

Marketing Tasks ✓

- Finalize your store marketing promotions.
- Begin mail, call, or text message campaigns to prior-year customers.
- Purchase thank you cards for customers.
- Contact local area businesses to distribute coupons for their employees.
- Create/revise your media contact list for upcoming press release submissions and community relations efforts.
- Review and submit template press release.
- Ensure you have an incentive program put in place for your preparers to sell Protection Plus.
- 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.

