



MARCH READINESS ✓CHECKLIST

Training Tasks ✓

- Review all appropriate tax law changes, itemizations and Schedules with tax preparer staff to prepare for late season client returns.
- Continue to check SwiftFP Social Media resources for industry news, support updates, software tips, and more.



Marketing Tasks ✓

- Continue local store marketing plans.
- Tweak as necessary based on clientele and Competitive environment.
- Utilize SFPWorks & SFP Link List of Non- Returning Clients report, to identify your clients from last year that have not returned to have their taxes prepared this year.
- Send thank you cards to returning clients who have completed their tax returns and be sure to request a referral.
- Distribute coupons and/or career-specific deduction checklists to large employers in your area.
- Consider a community relations effort to generate traffic and free publicity.

Bank Tasks ✓

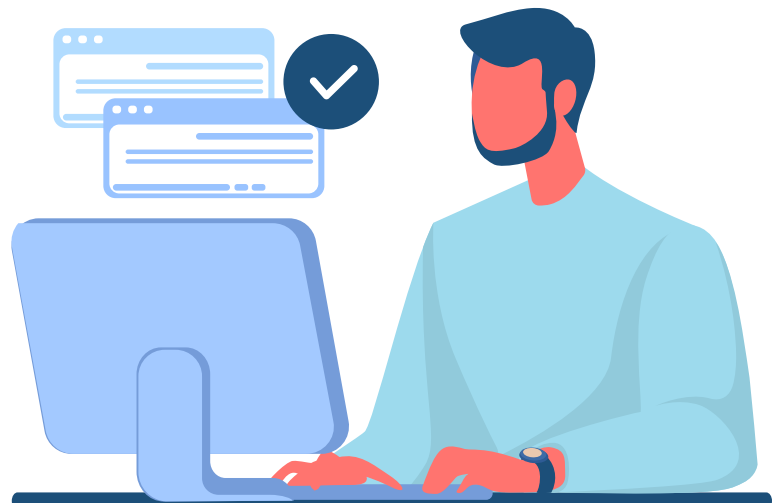
- Be aware of bank product (i.e. RTs, RACs) and be sure to communicate the benefits to your customers.

Software Tasks ✓

- Evaluate all fee and billing schedules and update accordingly based on clientele and competition.
- Familiarize yourself with all SFP Works & SFP Link software updates and releases as they become available.

Operations Tasks ✓

- Monitor your store volume and adjust hours of operation and schedules accordingly.
- Create tax preparer schedules for the month.
- Monitor all State and Federal rejects and ensure customers are contacted promptly for quick resolution.



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