

SOUTHEAST CHAPTER

AFTER TAX SEASON ROUNDTABLE - Topics for Discussion

1. How did the new due dates work for you in the second year? Better/worse than in the past? Did clients understand? What is the best way to educate clients?
2. How are the additional due diligence requirements affecting your practice?
3. Was there confusion regarding tax law changes/ ACA/ executive orders, etc? How did you handle this?
4. Cut off dates – did you use them? What were they? Did they work? How did you enforce? What did you promise?
5. How did you handle late K-1's and late/corrected 1099's? Did anyone go on extension because of them? How do you work this with your cut off date?
6. How do you handle workload compression/seasonality?
7. How do you handle complex K-1's (hedge funds, etc.)?
8. When did you start working on extensions? Who in your office does this? Do you encourage or discourage extensions? How do you tell clients they are going on extension? Do you charge more for extensions?
9. Tax organizers – do you use them? Do clients use them? Ideas for improvement? Questionnaires? How delivered?
10. How did your software perform this year? Any good additions or features that you appreciated? How did new password protections and masking of ID numbers go? Have you considered changing? What would make you move?
11. Did you try anything new that worked for you? Anything that didn't work?
12. Grade clients/staff. Plan to get rid of lower level clients/staff.

13. Data security/exchanging files with clients.
14. Client and practitioner password management/QB/software.
15. Cyber security/ identity theft issues?
16. What CPE do you need that came up this season?
17. How did total staff hours/time compare with last year?
18. How was research handled? Is research documented? What resources worked well for you?
19. Error reduction – did you see any particular problems?
20. How do you handle all the different ways data can come in to your office? Is there a way to handle this so that stuff doesn't fall between the cracks?
21. How often do you contact clients with work in process?
22. Were fees increased? Were additional or new services separately itemized on bills?
23. 2012 "Everything was easier 5 years ago". Since then – increased due diligence, ACA, Schedule D/8849/basis reporting/NIIT/Roth conversions, DOMA/—3, 1099 reporting...
24. Balance expectations client demands; regulatory compliance, quality control, preparer responsibilities. Pre-acceptance, initial contact, timing of work, response time, fees and payments. Avoid saying "simple, easy, not a big deal, no problem"
25. It took a lifetime... Easy for you, not the client. Why is it easy for you? What is your investment? Respect yourself.
26. Do clients want to pay for what they perceive as the same services?
27. Are you noticing fewer phone calls and more emails/texts? How are you handling communications?