



4 things a Thomson Reuters firm must do NOW to have a great tax season

with Darren Root and Sean Hanthorn

+ Create a better tax season

- Levels of tax returns
 - Create the model
 - Track in Practice CS
 - Will reduce 70% of time reviewing
- Digital everything
 - Client portals for document collection
 - Digital document signing
 - SurePrep tax document automation
 - Track in Practice CS



+ Create a better tax season

- Audit and communication protection
 - 20% fee surcharge
 - \$40K in new revenue
 - Track in Practice CS
 - Clear communication
- Digital everything
 - Client portals for document collection
 - Digital document signing
 - SurePrep tax document automation
 - Practice CS tracking

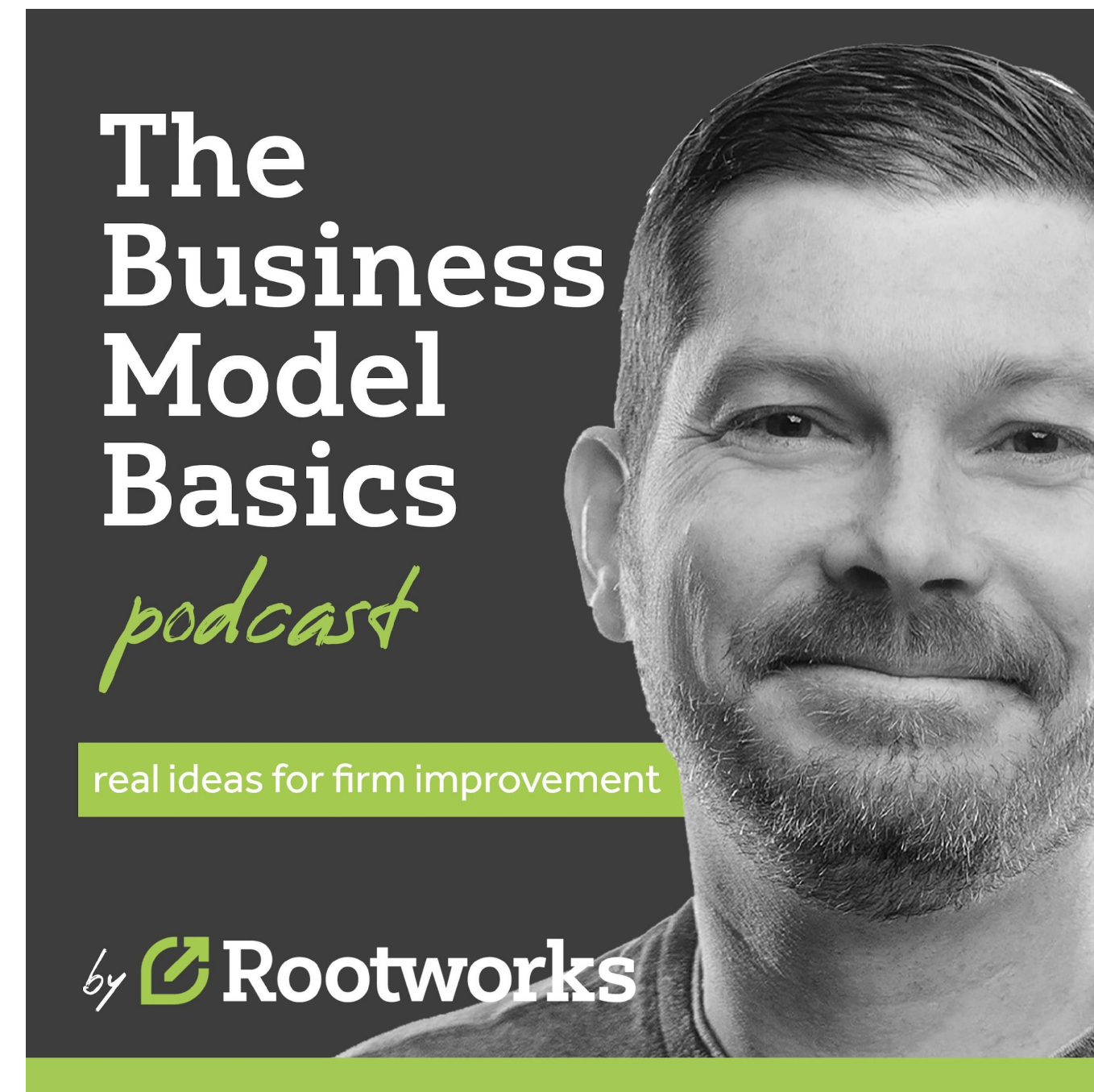


+ Create a better tax season

- Outsource excess tax returns
 - Onshore and offshore
 - Consider employee experience
 - Track in Practice CS
- Transitioning to Onvio
 - Document
 - Portals
 - Practice management
 - SurePrep integration
 - Tax



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