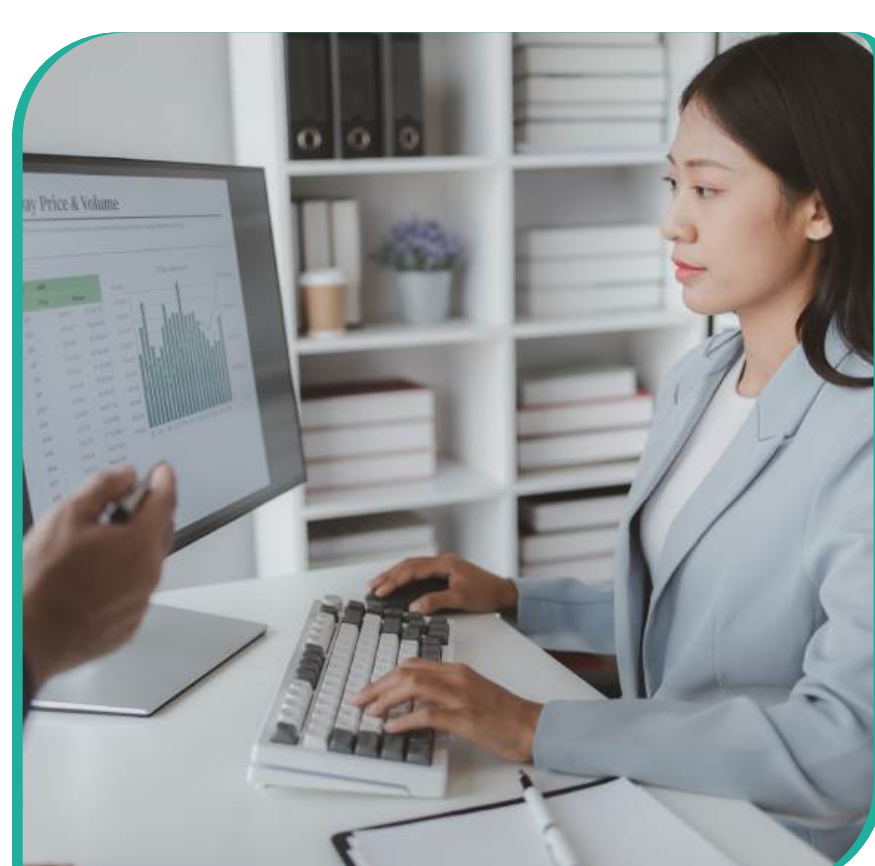


Steps to Launch Your Virtual Tax Office

Step #1: Choose Professional Tax Software That Does It All

Pick tax preparation software that includes a client portal. The portal lets your clients securely upload W-2s, 1099s, and other tax documents. This eliminates email chaos and keeps everything organized in one place. Make sure your software includes e-filing capabilities and bank products for tax preparers.



Step #2: Set Up Simple, Secure Payment Options

Clients need an easy way to pay you. Invest in an all-in-one tax practice management software, like ProClient, to send professional invoices that clients can pay online. Never ask clients to mail checks or drop off cash (this defeats the purpose of going virtual).



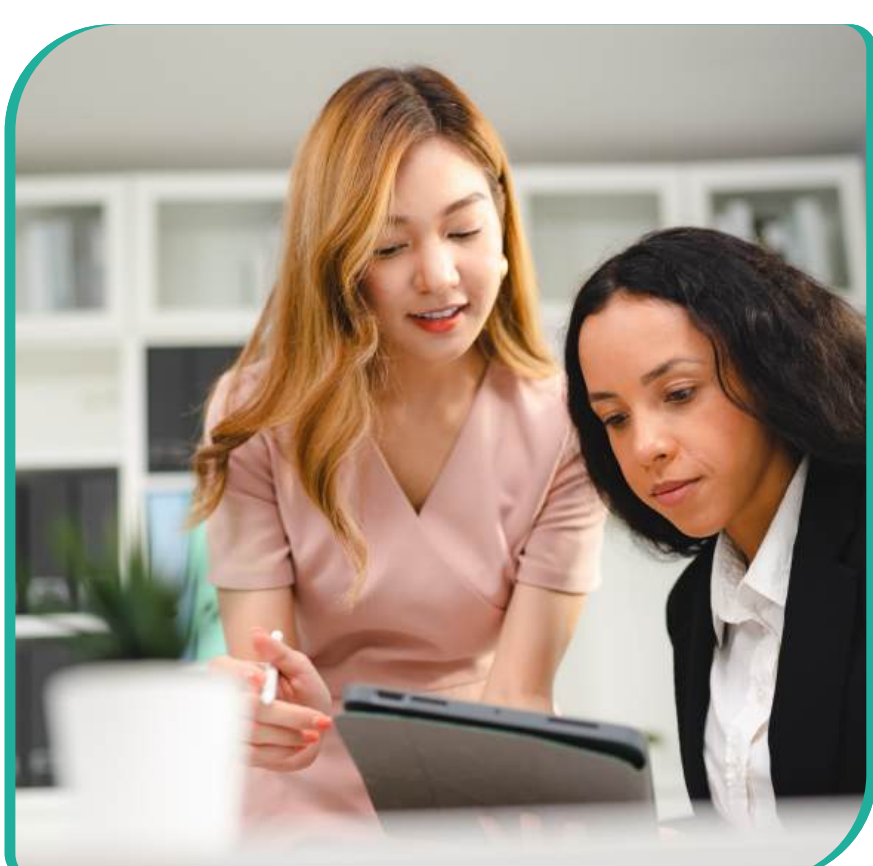
Step #3: Upgrade Your Virtual Meeting Game

Choose video meeting software like Zoom or Google Meet. Create a professional background for all client meetings. Pick a quiet spot with good lighting for your virtual office. Treat these meetings like in-person appointments—dress professionally and eliminate background noise.



Step #4: Make Electronic Signatures the Norm

Choose professional tax software that lets clients sign tax documents electronically through a secure portal. Your clients can sign engagement letters, tax returns, and Form 8879 with a few clicks. It's simpler for them, saving you from chasing down signatures during the busy season.



Step #5: Build a Client-Friendly Online Presence

Create a professional website that shows clients how to work with you virtually. Include clear instructions for uploading documents, scheduling meetings, and making payments. Consider holding weekly virtual "office hours" where clients can drop in with questions—just like they would at a physical office.



Step #6: Test, Tweak, and Perfect Your System Before Tax Season

Run through your entire virtual process by uploading test documents to your portal, scheduling and conducting a practice video meeting, sending a test invoice for online payment, and creating and sending documents for electronic signature. Then, fix any issues before launching. Trial runs with tech-savvy clients can provide valuable feedback to refine your system.

