

Transforming Your Office With Technology

January 21, 2015 at 10 a.m. – noon

January 22, 2015 at 1 p.m. – 3 p.m.

About the Webinar

Learn best practices for the tax professional's office such as converting to a paperless office, using electronic signatures with engagement letters and Form 8879, client information security measures, using technology to engage staff, improving your profits and freeing up time during tax season.

Learning Objectives: By attending this seminar, participants will be able to:

- Review a tax practitioner's Circular 230 requirements as the rules apply to client information
- Identify opportunities within a tax practice for using technology to transform office practices
- Describe pros and cons of various technology tools such as email, Cloud storage and communicating via mobile devices
- Evaluate risks of security breaches and identify steps to take when one happens
- Assess the return on investment associated with transforming office practices with technology
- Decide which technology tools are best for your office transformation

Agenda

- A. **Tax Practitioners Obligations for safeguarding client information** (15 minutes)
 - Circular 230 §10.35 Competence and §10.51 Incompetence as the provisions apply to client information
 - Circular 230 §10.32 Due Diligence – as the provision applies to safeguarding client information
 - Applicability of Gramm Leach Bliley Act
 - Other agency oversight that may apply
- B. **Using technology to improve efficient workflow and tax return delivery** (35 minutes)
 - Are you really paperless?
 - Best practices for handling client documents while you have them
 - Best practices for delivering returns to clients
 - Email delivery of password protected files?
 - State law impact on email delivery
 - Using client portals
- C. **Growing risk of security breach** (35 minutes)
 - Firewalls are not enough
 - Cloud storage alternatives
 - Types of security breaches and how best to protect yourself
 - Do you allow staff to use mobile devices for firm business?
 - Growing legislation that will impact requirements when there is a security breach
 - Can't I just buy insurance?
- D. **Using technology to improve bottom line performance** (15 minutes)
 - Available technologies that read tax documents
 - Savings beyond printers and paper
 - Preparing for the future and attracting talent
- E. **Questions and Answers**