

## PROVIDING VALUE DURING TAX SEASON

Tax season is an opportune time of year to convert annual transactional clients into planning and advisory clients. By utilizing your client's tax return data, you are able to shed light on their performance and how that compares to their industry, paving the way for advisory engagements after the deadline.

The Industry Data with Company Comparison Report generates a quick SWOT analysis of your client's performance, highlighting where they fall in the top and bottom 20% of their industry. Demonstrate an understanding of the health of your client's business and plant the seed by quickly identifying opportunities for advisory services after tax season. The report comes equipped with industry specific recommendations to help provide talking points and suggestions which can be used to develop solutions to areas of opportunity.

Tax season is the busiest time of year for accountants, but the benefits of setting aside time to discover how your clients have performed are valuable. You will communicate your value to your tax clients and highlight your financial acumen. By presenting an analysis of the tax return, firms can increase awareness of additional services provided. This, in turn, generates an opportunity to cross-sell tax clients and increase firm growth. It is a chance to demonstrate your value and help build a deeper relationship with the client.



UPLOAD YOUR CLIENTS' TAX RETURNS USING OUR AWARD-WINNING, PATENTED ELECTRONIC TAX RETURN READER

2023

TAX RETURNS ARE READY FOR UPLOAD!

profitcents®

“ Taking just a few extra minutes to upload client tax return data has the potential to yield huge benefits. It shows the client you have a true concern for the health of their business and could potentially lead to advisory engagements after the deadline. ”



**KRISTINA VIDAL**

Senior Customer Success Manager