AccuMax

Modern tax practice checklist

Tick what you already do.

1. Build the foundations

- ☐ Decide who you serve, and write down the work you will and won't take on.
- ☐ Write down your core processes (intake, organizer, documents, preparation, review, delivery) before you shop for tools.
- ☐ Keep what you know about each client in one place, not in people's heads and inboxes.
- ☐ Keep a written information security plan, review it every year, and oversee the providers that touch client data (IRS Publication 4557).
- ☐ Train every new and seasonal hire on confidentiality and on your plan before they touch a return.

2. Embed AI on purpose

- ☐ List every AI tool in use, including assistants built into software you already own and personal accounts. Sort them: approved, restricted, banned.
- ☐ Write a one-page AI use policy: which tools are approved, what client information may go into them, and who decides.
- ☐ Before client information goes into any AI tool, ask whether the upload is a disclosure of tax return information under Section 7216. If a signed consent is needed, get it first. An engagement letter does not replace it.
- ☐ Put it in the vendor's contract that your data is not used to train models and is deleted when you leave.
- ☐ Have a qualified person review every AI output before it is relied on, sent, signed or filed, and keep a short record of who reviewed what.
- ☐ Start with high-volume, low-judgment work such as sorting documents, keying source data and first drafts. Measure the minutes saved on one process.

3. Price and advise

- ☐ Know what a return costs you to prepare, by type, before you set a price.
- ☐ Move work you can scope from hourly to a fixed fee, and tell clients the price before work starts.
- ☐ Decide where the freed hours go: more returns, more advisory work, or no new hire. Decide before busy season.
- ☐ Turn one planning conversation you already have into a paid service.
- ☐ Review your prices once a year, before the engagement letters go out.

This is a checklist, not legal advice. Ask your own counsel and your professional liability carrier about Section 7216 and your engagement letters.

From AccuMax: practice management with the AI built in. More returns. More advisory. Same team.

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