

Best Practices A Roundtable Discussion



What are you doing to prepare for
Tax Compliance Season?

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CPAs & BUSINESS ADVISORS



Discussion Items

- Seasonal Hires
- Interns
 - What types of projects?
- Year End Tax planning communication
- Client tax information
 - Use of Tax Organizers
 - On Line Data
- Compliance Rates vs Standard Rates



Best Practices

- Training
- HLB Resources
- Documentation
- Attention to risk areas
- State Issues
- Timely Filings



Best Practices

- Foreign Income tax returns
- Foreign Payroll
- HLB International
- Disclosures & Documentation
- Foreign Tax Credit
- FATCA

2016 Planning

- Locations
 - Scottsdale Arizona
 - Palm Springs California
 - Nassau Bahamas
 - Savannah Georgia
 - Costa Rica
- Content
 - Fun, Fun and More Fun!!