Tax Professional Season Checklist

Pre-season readiness for tax offices and preparers.

Compliance

- ☐ PTIN renewed for every preparer
- ☐ EFIN application current; e-Services account active
- ☐ Written Information Security Plan (WISP) updated
- ☐ Due-diligence procedures reviewed (EITC, CTC, AOTC, HOH)
- ☐ Engagement letters and consent forms updated

Software & Technology

- ☐ Tax software installed, updated and tested
- ☐ Bank product enrollment completed
- ☐ Multi-factor authentication enabled on all accounts
- ☐ Secure document upload / client portal tested
- ☐ Backups configured and verified

Team

- ☐ Preparers trained on law changes
- ☐ Review process and roles defined
- ☐ Office hours and schedule published

Marketing

- ☐ Pricing finalized and posted
- ☐ Returning clients contacted
- ☐ Website, social media and Google profile updated
- ☐ Referral program launched