Checklist:

Get Ready for Tax Season

SmartVault

Complete these tasks now and your tax season will go from taxing to relaxing. *Your future Self will thank you.*

1 Schedule a Complimentary Account Optimization Session

We're here to ensure you have the **ideal workflows and tools** for this busy season. Book a **1:1 session** with our Customer Success team to:

- Audit your current account setup
- Optimize your workflows
- Explore advanced features like Docdown, Quoters, and eSignatures

SCHEDULE NOW

2 Audit Users

- [ ] Purchase User Licenses (Admin, Employee, Seasonal)
- [ ] Add Users to SmartVault Account

3 Update Client List

- [ ] Add New Clients
- [ ] Invite New Clients
- [ ] Link Connected Clients **New!*

4 Refresh Skills

- [ ] Watch "Getting Ready for Tax Season" Webinar
- [ ] Complete Tax Season Readiness Course
- [ ] Add SmartVault Academy Certificates to LinkedIn **New!*
- [ ] Schedule a 1:1 SmartHour

5 Get Started...

- [ ] Add a Tax Year 2024 Folder to Each Client Vault
- [ ] Share Guest User Education Resources with Your Clients

+ FAQs: Daily Workflows

- Requesting and Receiving Docs
- Printing Tax Returns into SmartVault
- Sharing Tax Returns with Clients

Click on each task for a detailed step-by-step guide.