

This agenda can be used for a pre-tax season planning meeting with partners and staff. Discuss what work needs to be done in each of the areas, agree upon it, and then assign each component to someone in the firm. Set a time line for completion. By doing this, you delegate and involve others, as well as ensure that all assignments are completed.

TAX SEASON PLANNING FOR 2007 RETURNS

EQUIPMENT:

SOFTWARE:

SUPPLIES:

TRAINING:

CORRESPONDENCE:

APPOINTMENTS:

OTHER :