

# Post Tax Season Checklist for CPAs

Things to do after the busy period ends



## Steps to use this checklist



Print it



Set deadlines  
against every task



Checkmark the box once  
the task is complete

- Cut the clutter and empty your desk drawers
- Shred or recycle trivial documents
- Digitize important papers and upload them on the cloud
- Upgrade your servers
- Employ a strong infrastructure with multiple layers of back-up and recovery strategy
- Bump up internet data after analyzing use during the past one year
- Participate in conferences to earn CPE credits
- Finish a short course on professional ethics
- Impart training as a QuickBooks trainer, guest lecturer or webinar speaker **[Optional]**
- Touch base with clients for their feedback
- Start planning finances of your clients for the next tax year
- Partner with an accounts outsourcing partner to make your job easier **[Important]**
- Go on a holiday

**Want to take control of the next busy season and bring it to a successful and profitable conclusion?**  
**[Schedule a call](#) with our team today.**