

A Solution for CPA Firms; A Shortage of Tax Preparers



For CPA Firms: A Practical Solution to the Shortage of Seasonal Tax Preparers

By Charles E. McCabe

CPAs are rarely taught how to prepare individual and small business tax returns in college. Those who go on to become competent tax preparers have usually learned this skill through continuing education or on-the-job training after passing the CPA exam. Most large CPA firms have developed their own in-house education institutions and faculty to provide practical continuing education for their employees. Small and mid-sized CPA firms are more likely to outsource education.

CPA firms that provide tax services typically have at least one partner who is a tax expert. However, individual and small business taxpayers may not be willing or able to pay the high hourly rate of a tax partner to prepare their returns. Therefore, most CPA firms need to develop a source of lower-cost qualified tax preparers, including paraprofessionals who are available on a seasonal basis. Unfortunately, there is not an abundant pool of qualified tax preparers available to meet this need.

Here is a Solution: The Income Tax School (ITS) provides two affordable and practical solutions for CPA firms to develop qualified tax professionals in-house.

1. A turn-key system for the CPA firm's tax partner(s) or professional(s) to provide live classroom or online instruction with minimal preparation required.
2. E-learning courses and seminars supported by ITS instructors.

Option 1: Classroom Instruction: Includes student texts and instructor guides complete with lesson plans, homework assignments, quizzes & exams with answers and teaching techniques & aids. The instructor needs only tax knowledge and communication skill to teach the courses. Instructor preparation is limited to reading the student text and reviewing the instructor guide to ensure an understanding of the topics and the answers to the quizzes, homework assignments and exams. And, if students complete the graded material online, everything is automatically graded!

Benefits of Live Classroom Instruction include:

- Observe candidates before hiring them
- Teach interview techniques through role-playing
- Student interaction enhances learning
- Instructor develops a rapport with students

Option 2: Online Instruction: All ITS courses and seminars are available as interactive e-learning programs that enable students to study independently anytime, 24/7, with internet access. The e-learning learning management system (LMS) automatically grades homework, quizzes and exams and provides instructional feedback. Instructor support is provided by e-mail and a student forum is available. The curriculum is the same as for live classroom instruction.

Benefits of e-Learning:

- Accessible from any computer with Internet Access
- No classroom teaching and equipment required
- Automatic grading of all homework, quizzes and exams
- Easy monitoring of students' progress
- Easy online access to useful resources (IRS website, forms, Publication 17)
- Students can work at their own pace, 24/7
- Accommodates students unable to attend live classes

CPA firms could also use a combination of classroom and e-learning to reduce the number of classroom hours for the instructor and the students, while still providing live interaction.

For more information, please visit ITS at www.TheIncomeTaxSchool.com or call 800-984-1040.

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About the Author

Charles E. ("Chuck") McCabe, a 40+ year veteran tax industry executive, has managed hundreds of tax preparation offices. Chuck earned his B.S. degree in management from Adelphi University and Executive M.B.A. degree from Pace University. He is a national speaker, teacher and author on small business and tax practice management. Chuck is founder & CEO of Peoples Income Tax, Inc. and The Income Tax School, Inc. He has been included for multiple years in the Accounting Today Top 100 Most Influential People in Accounting. In addition, Chuck has written a book, published by ITS in 2017, titled: *Guide to Start and Grow Your Successful Tax Business*. Additional information may be obtained by calling Chuck at 1.800.984.1040, by emailing cmccabe@TheIncomeTaxSchool.com or by visiting the ITS website www.TheIncomeTaxSchool.com.

About The Income Tax School

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