

Kansas Chapter

NATPTMNational Association of
Tax Professionals**INSIDE THIS ISSUE:**

- 1 - President's Message
- 2 - Important Dates
- 3 - Serving Clients Remotely
- 4 - Drake software
- 5 - Member Contact Information



The President's Message

BY TAMMY HARMON, EA

2020. Well, we won't forget this year anytime soon, will we? I can barely remember the beginning of tax season, other than the usual scramble to finalize books, issue 1099s, and W2s, followed by the marathon of client appointments, endless tax returns, and countless questions to answer. And just when we were ready to start our countdown to hibernation, the country stopped. Covid. Shutdown. Worry. Within a day, we were suddenly revamping our businesses. Tax season is always interesting, but tax season in the middle of a pandemic? While many professions shut down, we had to up our game. March meant stacks of returns still needing to be filed, with people needing their refunds more than ever.

Add to that the PPP (I still cringe when I hear those initials) and the barrage of "Where's my

stimulus check?" phone calls, and we were in for some real fun. To make sure we continued that fun, we got an extended tax season. Our marathon got longer. But through all the tax returns, the PPP documentation, the stimulus questions, and the endless phone calls, texts, and emails, we made it through. We realized how important our profession is, with flexibility and knowledge to be the key to our business success.

The rest of 2020 will continue to bring new challenges when it comes to meeting with our clients and continuing to deliver the service they expect and need in these uncertain and daily changing times. Will there be another shutdown? Another extended tax season? Will you meet with clients face-to-face? Mask or no mask? Will you go remote? Zoom, phone

conferences? Don't forget, just because you're comfortable with one method doesn't mean your client will be. Flexibility will be the name of the game.

We always expect a changing tax code, but becoming PPP and stimulus check experts in the middle of tax season was especially fun. It's not even close to being over. Now we've got a payroll tax holiday, loan forgiveness issues, and a possible second round of stimulus money (help us all!). Of course, we haven't yet covered the tax law changes. In case you haven't heard, there's an election in November. Now, more than most years, we have to stay ahead of the learning curve. Unfortunately, KS NATP was unable to host the IRS Symposium due to the lack of IRS speakers. With the uncertainty of venue restrictions and speaker availability,

(continued Page 2)



Officers:

President

Tammy Harmon
tharmon@harmonfts.com

Vice President

Joshua Smith
jssmith@swbell.net

Secretary

Christy Dunham
accountingplus1040@cableone.net

Treasurer

Sara Wright
sara@protaxaccountingllc.com

kansasnatp@gmail.com

VISIT US ONLINE:

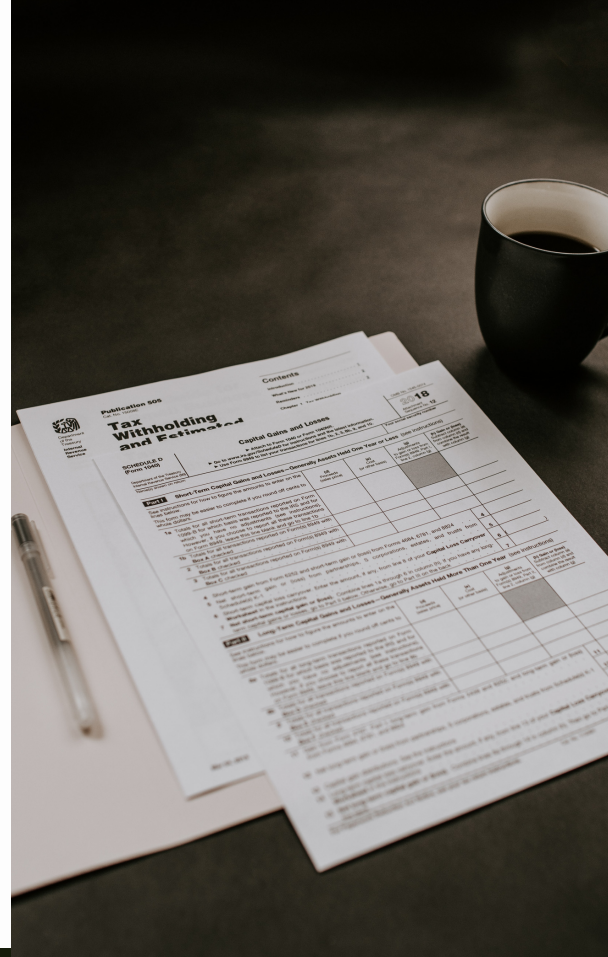
ksnatp.com
www.facebook.com/groups/ksnatp

The President's Message

(continued from Page 1)

our in-person Annual and Fall Seminars also had to be canceled. Don't give up though! NATP has a variety of online classes available. I attended NATP's virtual national conference and, although I missed the face-to-face networking, the classes were just as informative. I also encourage you to take advantage of KS NATP's Tri-State offering that will be held virtually this fall. For quick peer education, connect with other Kansas tax pros on our KS NATP Facebook page.

Now is the time to step up your game. Be flexible and keep learning. Our clients need our help more than ever, and 2021 may be our most interesting tax season yet. You survived tax season during a pandemic, so you can deal with whatever comes your way. Best wishes for the rest of this tax year, and start making plans now to make 2021 the best tax season yet!



Important Dates

WHAT	DATE/TIME	WHERE
Annual Chapter Meeting	Oct 23 1-1:50 PM CST	Online
Tri-State Webinar	Nov. 13 1-4 PM CST	Online

Register for either meeting here: [NATP Registration](#)

"Strategy is about setting yourself apart from the competition. It's not a matter of being better at what you do - it's a matter of being different at what you do." - Michael Porter





Serving Clients Remotely

BY CHRIS JONES, EA

For many of us, the pandemic forced us to (quickly) transition our staff and clients to a paperless system of receiving documents and sharing final drafts of tax returns.

In this article, I share a few strategies to deliver our services remotely that work well for my team and receive compliments from our clients. Communication is key. My office uses the following apps to stay on top of our work. Please note that I am not advertising for anyone here--there are a lot of options for each category:

Internal Communication

We use Slack for internal messages. This is a free app that is secure and works on all computers and phones.

Emails are not allowed for internal messages.

Client Portal/CRM

I dislike portals, whether it is my doctor or kid's school, I see portals as another password to remember and awkward system to learn.

Client Portal (cont'd)

Clients resist our portal, too, but it is a necessary evil. How else can we securely deliver electronic tax docs?

We use Canopy, which combines a portal with Client Relationship Management (CRM) tools. Similar products are TaxDome and Karbon.

Video Tools

Our clients love video. We use Camtasia to capture our screen while walking them through their tax return (delete or blur the SSNs!).

Loom is another option to add a small video of you while recording the screen.

We use either Vimeo or Youtube to share the result. Be sure to leave your videos unlisted (adding a password is even better).

I hope this helps! Email me if you have questions:
chris@jonestaxbenefits.com

"There ain't no rules around here. We're trying to accomplish something." - Thomas Edison



Great support. Great price.
Great software.

Drake Tax proves
that award-winning
software and customer
support don't have to
break the bank.



My overall experience
with Drake Tax
is amazing and I
recommend it highly!

**JAMES, VALUED DRAKE
SOFTWARE CUSTOMER**

DrakeSoftware®

Professional Tax Solutions | Since 1977

Toll-Free **800.890.9500** | Free Demo **DrakeSoftware.com**

Kansas Chapter



National Association of
Tax Professionals

Contributors:

Chris Jones, EA
Editor
chris@jonestaxbenefits.com

Tammy Harmon, EA
tharmon@harmonfts.com

KANSAS STATE ANIMALS



DID YOU KNOW?

- Lebanon, Kansas sits at the geographical center of the United States.
- The first Pizza Hut and White Castle opened their doors in Wichita, Kansas.
- On March 4, 1918, the first known cases of Spanish Flu were reported in Fort Riley, Kansas. (Thank goodness media coverage was slow in 1918 and Spain was mistakenly identified as the epicenter!)
- The original 23 words of the Pledge of Allegiance were written by Frank Bellamy of Cherryvale, Kansas in 1890 as a school project.

MEMBER GET A MEMBER

Do you know someone who might be interested in NATP and all the benefits for members?

You might want to check out National's "Member Get a Member" campaign. You could win a \$15 or \$30 gift card, a free membership, or even \$1,000 in cash!

Just put your name on NATP Membership Enrollment forms in the "Who recommended your to NATP?" line and hand them out to non-member tax professionals. When they join...you win!!

OFFICERS/BOARD/COMMITTEE MEMBERS

Tammy Harmon, EA
President
tharmon@harmonfts.com

Joshua Smith
Vice President
jssmith@swbell.net

Christy Dunham, AFSP
Secretary
accountingplus1040@cableone.net

Sara Wright, EA
Treasurer
sara@protaxaccountingllc.com

Leahann Snow, EA
Board Member
leahann@sprucecorp.com

Vonda Nail
Board Member
vnail@taxworks.kscoxmail.com

Larry Hammer
Board Member
hamigmer@yahoo.com

Lee Dunham
Board Member
dumhamir@yahoo.com

Chris Jones, EA
Board Member
chris@jonestaxbenefits.com

COMMITTEE CHAIRS

Tim Cain
Regional, Govt. Relations & Education

Larry Hammer
Prof. Standards

Vonda Nail
Regional, Education & Communications

Christy Dunham
Education & Govt. Relations

COMMITTEE CHAIRS (Cont'd)

Tim Graham
Education & Govt. Relations

Joshua Smith
Nominating, Communications & Scholarship

Nolin Christensen
Bylaws & Education

Mary Giesler
Membership, Scholarship, & Education

Chris Jones
Newsletter

Leahann Snow
Communications & Education

Kerry Bush
Regional & Education

Tammy Harmon
Scholarship