

# BEYOND THE BALANCE SHEET: CLIENT CONVERSATION STARTERS

Now is the time to move beyond compliance and offer valuable insights. Dawn Brolin, CEO of Powerful Accounting Inc., has compiled a list of key questions to guide discussions with clients during tax season.

## Business strategy

- What is your current business strategy, and have there been any shifts in your long-term goals?
- How can your tax strategy align with your overall business strategy?

## Cash flow management

- How is your cash flow management currently structured, and are there opportunities for improvement?
- What steps can be taken to optimize cash flow for your business?

## Technology integration

- How well is your business leveraging technology, and are there areas for improvement or expansion?
- What technological advancements could benefit your business operations and financial management?

## Employee engagement

- How are employee engagement and satisfaction within your organization?
- Are there incentive programs or benefits that could enhance employee motivation and retention?

## Risk management

- What are the significant risks facing your business, and how can they be mitigated from a financial perspective?
- Do you have adequate insurance coverage for potential risks?
- Do you have a buy/sell agreement for your partnership?

## Regulatory compliance

- How well is your business keeping up with changing regulations, and what steps can be taken to ensure compliance?
- Are there potential risks associated with non-compliance?
- How have you communicated with your clients about the BOI reporting requirements?
- For S-Corps and C-Corps, discuss the requirements for reasonable compensation.



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