■ HELPFUL HINTS FROM CCH

Have you done everything you can to ensure a successful tax season?

Although most firms consider themselves fully prepared for tax season by this time of the year, there are a few last-minute steps you can take, even in the middle of the rush, to make things run smoother for your firm and your clients.

- **Secure file exchange** – Protect your clients from fraud by ensuring sensitive data is never sent through unsecured means, like email. The safest way to exchange files is through a secure portal, where only your clients and their designated users know the password. Portals can be set up in batches to save time, and using a portal as long-term file storage can be an excellent added-value for your clients year-round.
- **Firm website** – If there's one time of year your clients are visiting your website, it's now. New website tools available through CCH Site Builder allow clients to request appointments and even submit payments online. One way to keep your clients coming back to your website even after tax season is to offer professionally-written eNewsletter articles and financial calculators.
- **eSignatures** – Getting IRS Form 8879 signed no longer has to be a battle, now that the IRS is accepting eSignatures for this formerly-troublesome process. Make sure you're using an eSignature tool that uses Knowledge-Based Authentication to verify the taxpayer's identity. The award-winning CCH eSign was the first such tool released to the market, with almost a full a year of successes so far.
- **Research Tools** – Many tax preparers begin their tax research with a Google search, but finding reliable and accurate answers among millions of hits can be difficult. A new CCH IntelliConnect Browser Search plug-in lets you search professional research and analysis at the same time you're searching with Google.

■ DFK MEMBERS DOING GOOD

Bernard Robinson & Company – Where BRC Stands for "Be Ready to Care"

Having been in business since 1947, for over 65 years nonprofit organizations have held a special place in BRC's history and in our hearts. Beyond advising and serving over 220 nonprofits as clients, we also realize the profound impact of well-run nonprofits on the communities in which we work and live. To that end, we strive to educate nonprofit organizations through programs such as the BRC Not-for-Profit Board Effectiveness Seminars, annual Financial Symposiums and two customized newsletters – our quarterly, *BRC Nonprofit Adviser* (exclusively for nonprofit organizations) and our monthly, *BRC Strategy.*

BRC's two half-day Not-for-Profit Board Effectiveness Seminars held in 4Q 2014 (added to our educational programming docket in 2014) also demonstrates our commitment to supporting not-for-profit organizations in a truly foundational way. With a team of knowledgeable presenters covering such topics as innovative fundraising ideas and practices, understanding and analyzing nonprofit financial statements, a best practices panel (comprised of an accountant, attorney and insurance representative) and more, the program was well-attended and well-received. All registration fees collected were donated to one of the not-for-profit organizations represented in the room via a drawing.

While awareness and education are key to nonprofit organizations, so are contributions of time and money. Our social responsibility and growth led our firm to form a standing committee called the BRC Council which organizes our involvement in community activities. Employee-nominated and employee-elected, our Council keeps us all busy throughout the year in engaging and contributing to a variety of different organizations annually and taking care of our community around us in other meaningful ways:

- **CPA Day of Service.** Annually, each of our offices closes for one day to allow each team member to volunteer their time helping area not-for profit organizations.
- **Leftover Halloween candy drive.** We collect left over Halloween candy from our office and other area businesses for Gunny Claus to take to families of Marines deployed at the hundreds of duty stations around the world to assist those having trouble making their holiday magic happen.
- **Donation in lieu of holiday cards.** In lieu of printed holiday cards, a donation is made to the Wounded Warrior Project in support of injured veterans returning home from the battlefield.
- **Jolly Jean Days.** Employees have the option of contributing $5 to wear jeans one Friday of the month to be applied toward holiday presents for children in need.
- **Red Cross blood drive.** We promote and host an annual blood drive in our Training Room for the local community.
- **Maintaining a paperless office environment.** We shred and invest in software in support of this initiative.
- **Recycling paper, plastics, cardboard and aluminum.** We have paper recycling containers at all desks, plastic and aluminum bins for refuse, drink tab collection boxes for Ronald McDonald House set out, provide reusable dishes and cutlery, etc.
- **Personal time contributing to charitable causes.** From serving as Presidents and Board Members on not-for-profit organizations to being rescue shelter volunteers and school tutors, we work toward making our community a better place.
- **Participating in professional and civic organizations.** As NCACPA Committee Chairs, involved in the AICPA G400,HRMAG members and more, we support our professional organizations. We participate in ball teams and sponsor youth swimming and softball teams.

In regard to this involvement, Tax Partner Freddy Robinson, makes it clear to everyone not to volunteer for business purposes. Freddy says, "Although we do not set formal expectations around volunteerism, we have high rates of involvement with professional and civic organizations. Volunteering is personal. I find the most effective volunteers are those who do so because they are uniquely inspired by a particular cause." Recognizing this and celebrating individual giving is part of what makes BRC the only firm in North and South Carolina to be included in *Accounting Today's* Best Firms to Work For list for the past three years.

As Managing Partner Wade Pack once said, "We are a firm of people who care about people." This applies to our clients, team members and our greater community. We have a culture of caring. We interact with our greater community in a variety of ways, which are both enjoyable and rewarding. We are certified public accountants and advisors who strive to serve our clients with diligence and care, and beyond that we are citizens and technicians who desire to give back to our community and profession.