Take Tax Action using scalable operations.

Client identifiers

Once you identify tax ideas to take tax action on, you'll want to earmark clients who can benefit. Tag clients with identifiers to help scale your tax planning efforts, so you deliver value across your entire client base, not just your top clients.

Here are some non-dynamic personas you may be able to find in your book of business to tag accordingly:

1. Wage earners
2. High income earners
3. High tax rate state resident
4. Under retirement age
5. Capital gain potential
6. High basis account
7. Charitably Inclined
8. Charitable Inclined, non-itemizing
9. Charitably Inclined over 70.5
10. Subject to RMD
11. Lower tax bracket (10, 12, 22, 24%)
12. High Net Worth

Run advanced-find reports to identify dynamic and non-dynamic personas, then use bulk-updates to add client identifier(s) if possible.

Take Tax Action

- Deliver value where you'll make the most impact. Segment your clients.
- Learn how to scale tax planning using CRM efficiencies.
- Use our tax planning workflow to help streamline your tax planning operations.
- Take tax action again and again by implementing our always-on tax planning workflow.

For help implementing workflows or scaling with today's operational tools, utilize the Scale with Operations toolkit.

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