RESET YOUR MINDSET FOR TAX SEASON

THE BIG THOUGHT:
Tax season starts in your mind long before it starts on your calendar.

ONE ACTION:
Establish your protected "production hours" and schedule them for the entire month.

TECHNICAL REMINDER:
Audit your entire client list for accuracy—names, entities, filing types, deadlines, and expected returns.

Take a breath. It's Monday, and we're stepping into December with intention.

This week's big thought is simple but powerful: **Tax season starts in your mind before it ever starts in your software.** If you don't set the tone now, the season will set it for you. And we both know—the season doesn't care about your peace.

I want you to think of December as your runway. Calm, controlled, structured. This is the month where you decide how January and February are going to feel. Not reactively—intentionally.

So here's your action for the week:
Establish your protected production hours.
Pick one block per day, even if it's just 60 minutes, and mark it off for the entire month of December. These hours belong only to you—no calls, no emails, no interruptions. Production time is sacred. If you don't protect it, no one else will.

Now let's talk about the technical side. Before tax season gets loud, you need clarity on who you're serving and what each client needs from you. This week, I want you to audit your entire client list.
Check every name.
Every filing type.
Every required return.
Every entity.
Every jurisdiction.
Every deadline.

Don't wait until February to realize a client has a trust return, or a business personal property filing, or a payroll obligation you forgot they had. Those surprises cost you hours of your life.

This is your calm-before-the-storm moment. Clean data equals a clean tax season.

So remember:
**Your mindset sets the tone.
Your schedule sets the boundaries.
Your client list sets the reality.**

And you're not surviving this season—you're leading it."

REVERSE THINKING REQUIRED

Tax Season Readiness Checklist

Mastermind Edition

1. Mindset & Structure

☐ Block protected focus hours daily.

☐ Create your "Not This Year" list (3 tasks you refuse).

☐ Write your client expectations policy for tax season.

☐ Set communication boundaries.

☐ Choose exact days/times you will NOT work.

☐ Review pricing; update minimum fees.

☐ Identify problem clients and pre-set boundaries.

2. Client List Prep

☐ Clean and update your client list:

   ☐ Verify legal names, entity type, EIN/SSN, addresses, phone.

   ☐ Confirm filing jurisdictions (federal, state, county, local).

   ☐ Determine returns required for each client:

      ☐ Individual 1040 + schedules.

      ☐ Business returns: Sch C, 1065, 1120-S, 1120.

      ☐ Trust/Estate: 1041. Nonprofit: 990 series.

      ☐ Property/Business Personal Property returns.

□ Payroll: 941/944, 940, W-2/W-3.

□ Information returns: 1099-NEC, 1099-MISC, 1099-K, 1098 forms.

□ Sales/Use tax, Franchise/Gross Receipts tax.

□ Identify owners/partners and required K-1 flow.

□ Capture payroll/merchant processors for 1099-K.

□ Note bookkeeping method and software.

□ Record statutory and engagement deadlines.

□ Categorize clients by priority (A/B/C).

□ Identify missing documents per client.

□ Send engagement letters.

□ Disengage clients you won't serve this season.

□ Create late-filer list with planned reminders.

3. Organization & Documents

□ Send organizers/checklists to clients.

□ Update/test client portal structure.

□ Verify e-signature systems.

□ Create standardized folder templates.

□ Automate missing-document reminders.

□ Prepare 1099 workflows and vendor lists.

□ Update property tax asset listings.

4. Workflow & Systems

☐ Document one major process to eliminate manual steps.

☐ Define workflow: intake → prep → review → e-file → delivery → archive.

☐ Batch returns by complexity or entity type.

☐ Create triage questions for new or unclear client requests.

☐ Set review standards (even solo: cooling-off review rule).

☐ Create canned email templates.

☐ List weekly batch tasks (vouchers, reminders, organizer nudges).

5. Technology & Security

☐ Confirm encrypted backups & recovery plan.

☐ Enable MFA everywhere.

☐ Update password manager.

☐ Test scanner/printer/signature pads.

☐ Update tax and bookkeeping software.

☐ Check workstation performance (RAM, storage).

☐ Update email filters and security rules.

6. Client Communications

☐ Send Tax Season Expectations email.

☐ Define approved submission methods.

☐ Communicate turnaround times.

☐ Clarify pricing and payment expectations.

☐ Schedule broadcast reminders.

7. Office & Personal Prep

☐ Optimize workspace for efficiency.

☐ Stock supplies (labels, folders, toner).

☐ Plan recovery rituals.

☐ Align family expectations with workload.

☐ Schedule health appointments.

☐ Plan meals or meal prep.

8. Financial & Business Prep

☐ Set revenue and capacity goals.

☐ Update fee schedule.

☐ Review cancellation/no-show policies.

☐ Decide scope limits for tax season.

☐ Forecast workload by entity type.

☐ Create cash buffer for season needs.

9. Reverse Thinking Required Actions

☐ Write what YOU expect of clients.

☐ Remove low-fit work before peak season.

☐ Install protections early (gatekeeping, scope control).

☐ Create one leadership-level standard this week.

☐ Rebuild your calendar to serve your life first.

RESOURCES

Client Tax Document Checklist

Individual Tax Return Cover Letter

Individual Engagement Letter

S-Corporation Tax Return Cover Letter

S-Corp Engagement Letter

Partnership Tax Return Cover Letter

Partnership Engagement Letter

BOI EMAIL TO CLIENTS EXAMPLE

BOI ENGAGEMENT LETTER EXAMPLE

ADP PAYROLL VALUATION GRID

WHERE'S MY IRS REFUND

FEDERAL TAX WITHHOLDING CALCULATOR

IRS INDIVIDUAL ONLINE ACCOUNT

SOCIAL SECURITY ADMIN ONLINE ACCT

SETUP IRS PAYMENT PLAN

MAKE IRS TAX PAYMENT

PROFIT & LOSS EXCEL TEMPLATE

INTERNAL TAX FILE DOCUMENT ORDER

FORM 1040 BASIC PREP STEPS (NEW STAFF)

FORM 1040 PREP & REVIEW CHECKLIST

BUSINESS TAX PREP CHECKLIST

BUSINESS PREP STEPS (NEW STAFF)

ACCOUNTABLE PLAN TEMPLATE (WORD)

ACCOUNTABLE PLAN TEMPLATE (PDF))