



INTELLIGENT OFFICE

How Finance & Tax Professionals Use Virtual Office Services During the Busy Tax Season



Finance and tax professionals, whether they work solo or as part of a larger firm, can use virtual office spaces and services to stay on top of their workloads, especially during the busy tax season. Professional virtual office spaces can be particularly useful when back-to-back client meetings are necessary, and scheduling those appointments is easy with the proprietary systems that sophisticated providers offer.

Having the necessary space to meet clients and store important documents is helpful, but services complete the package. Some of the most commonly used services include administrative assistance such as call answering, appointment scheduling, receiving and scanning documents, and coordinating client pickup of important documents. Most tax and finance professionals also opt to use a prestigious mailing address and private, locked mailbox. Suddenly, tax season doesn't feel quite so stressful.



Conveniently Meet Clients

From solopreneurs to larger tax and financial firms, Intelligent Office's virtual office spaces give tax and finance professionals the flexibility they need to meet the fluctuating demands of their customers. This can be helpful throughout the year, but the benefit is amplified during tax season.

Streamline Client Meetings in Professional Office Spaces

Client meetings are a necessity, especially during the busy tax season that spans January through April. With virtual office solutions, tax and finance professionals are able to utilize the spaces they need during the times they need them most, and they don't have to worry about paying for unused office space during the remainder of the year. It's very common for tax and finance professionals to schedule back-to-back meetings, as many as four within an hour, to handle quick consults after a client drops off documents. Because tax and finance services vary so much throughout the year virtual offices are an excellent way to accommodate these fluctuating needs and workloads. Renting full-time office space is also an option that conference and other meeting rooms when they need them.

Virtual office clients have visibility into a live calendar that's updated in real-time as rooms are booked. Depending on their contract and the services they've signed up for, they'll receive access into a client portal where they can see space availability and book rooms at a discounted member rate. Alternatively, prospects and non-members can access the calendar through a special website to easily book conference rooms and other spaces directly with their credit card, even from mobile devices.

Maintain Compliance with Safe, On-Site Storage Options

Storing documents during busy season can also be a problem, especially in smaller offices. A virtual office solves this issue by offering locked, on-site storage solutions that are entirely compliant with document storage rules and regulations. Tax and finance professionals can leave these documents at their local virtual office branch, feeling confident that those important items are safe and can only be accessed by them and their team. After the tax season is over they can continue using this service if it's useful, but if it's no longer a business necessity that's not a problem – virtual office clients can simply begin using the locked storage again next year when the need arises.

Thrive During Busy Times

The solutions that tax and finance professionals can use aren't limited to office spaces – they can also receive a full suite of administrative support to carry them through their busiest working periods. These administrative assistants are specially trained to work with a variety of tax and finance professionals. It's their job to adapt to the needs of each individual client, including their specific preferences and working styles. As a result, virtual office users can focus on the core tasks that keep their businesses running.

Reception Services

Reception services, like phone answering and appointment scheduling, can help free up valuable time for individuals working on their own, capture new business by scheduling an appointment on the first point of contact, or take away the phone burden from other staff members in larger firms. Administrative assistants help these professionals manage any conceivable administrative task, from handling incoming calls to message taking and making comprehensive notes. Professionals can even access contact information from the past several months to see who called their business, when they called, and what was talked about. These services are useful during busy times, but they can also be extremely helpful once things calm down: tax and finance professionals can use this information in their marketing and outreach efforts throughout the year.

Document Management and Handling

One of the most convenient benefits of using virtual office services is flexibility for picking up and dropping off important tax and other financial documents. Clients of tax and finance professionals can drop off their documents at the front desk of each location, and then the administrative assistant will lock those documents up in the appropriate private, locked mailbox. Alternatively, those documents can be scanned and immediately sent to the virtual office client.

After the tax preparer is finished with those documents they can return them to the administrative assistant. The assistant will even notify the tax preparer's clients that their documents are ready to be retrieved.

Conclusions

CPAs, CFAs, and other tax and finance professionals who take advantage of virtual office solutions and spaces can save time and money while working their way through silly season. Whether they need conference room space, a mailing address, administrative help, or anything in between, virtual offices offer solutions that fit every need.



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of Intelligent Office's many services.**

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