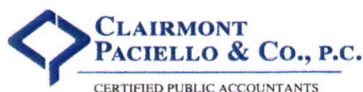


## News You Can Use



*Brought to you by Clairmont, Paciello & Co., PC*

610-265-4122 | [Lisa@cpcfinancial.com](mailto:Lisa@cpcfinancial.com)



### When Was the Last Time You Cleaned up Your Website?

Once you have a website, that's it, right? You can just leave it alone and it will do all the work for you, correct?

Sorry, that's not quite how it works. Websites need updating regularly, whether that's new information about the company, a content-generating blog or some SEO upheaval. Below are some tips for revamping your online presence.

**Check bad links** Something tedious we can all forget to do, make sure you're regularly checking that all your pages are live. Bad links can put a damper on your search score, so keep them fresh and 404 free. **Delete out-of-date posts** If your website has a blog or a space for changing content, make sure you go through it once a month and delete posts that have out-of-date promotions or aren't doing anything for your Google rating. **Evergreen query-based posts** will always help, but anything outside of that should probably go.

**Keep your information fresh** Maybe you moved offices a little while ago and forgot to update your contact information. Perhaps a member of staff got a promotion and their title needs updating. It could even be that you have changed what services you offer.

**Keeping up to date with these small things** keeps you looking professional and ahead of your game. **Simplify** We have a tendency to overload our websites.

You probably don't need 10 pages to describe that one service. Keep it streamlined and clean looking, and your clients will come to you for information.

## Anchor Clients: What They Are and How to Land Them

Chances are if you own or run a business, you'll have heard the phrase "anchor client" being thrown around: why you should have them, why they're important for your business, but not necessarily how to get some of your own.

But before we drop some tips about how to land, keep and conquer repeat clients, let's define them. To be clear, anchor clients are not the same as recurring clients. Clients who subscribe to your services or are members of websites like Patreon and Kofi are recurring clients, the slightly smaller fish in the business pond. Anchor clients sign on for multiple big projects over an extended time period. If you offer PR services, for example, they may come to you for each major campaign.

### Why are they important to have?

They help you look for other clients that benefit your business. When you can be sure of a large income coming from one client, you can selectively fish for more projects without becoming too hungry.

Anchor clients also allow you to build a niche and rapport. The more you work with one client, the better you know them and the better you'll both work.

### So you've found an anchor client. How do you keep them?

The simple answer? Overdeliver. And not just once. Every single time. Let them know that you've got their best interests at heart and you care about the work you're giving them. If they feel valued, they'll want to keep working with you and perhaps even introduce you to more clients.





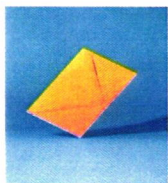
## Worth Reading



The end of the year always brings a lot of information in the mail or email. If you have any questions, please do not hesitate to reach out to us!



Sandy & Robin Goldfine are on the move again. As of 11/13/23 they will be living in Haymarket Virginia. Near their son Brett, Daughter-in-law Sandra, grandchild Scarlet and soon to be grandson. By the way, Sandra is a Doctor of Chiropractic & Sports Medicine and is practicing in the Reston Virginia area.



Reminder to check you mail in January for important tax items as well as income tax appointments. If your address has changed please notify us.



## The Case for Having Humor in Business

The workplace can often feel like an environment rife with the performative solemnity of adulthood.

When the going gets tough, many offices enter a heads-down mode in which any deviation from seriousness is taken as a distraction from the task at hand.

However, according to research from the London Business School, Wharton and MIT, amongst others, laughter in the workplace can actually bring incredible benefits to productivity in a business environment.

Regular laughter has been shown to relieve stress and apathy, causing a boost in creativity, attention to detail and collaboration amongst colleagues. So how, then, can more humor in the workplace be encouraged without annoying the busybodies who tut at the first sign of office giggles?

According to the book *The Humor Code: A Global Search for What Makes Things Funny* by professor Peter McGraw and journalist Joel Warner, there is a formula that may help what would otherwise be subjective humor become a more inclusive, universal joke that everyone can get in on. They name the theory "Benign Violation" and witnessed it in effect in a diverse range of environments, from comedy clubs across the USA to remote forest villages in the Amazon. Benign violation involves provoking laughter when it is "unsettling" or "wrong" to do so yet is also "safe" and "acceptable."

While this may have many variations, the general gist is that an assumption has been made but discovered to have been a mistake in which the general audience may find a pun, innuendo or prank to be laughed at. This is, of course, context and audience dependent, but finding some way to bring joy and laughter into the office environment has a wealth of positives for an effective workplace.





# *Testimonials, Reviews and Recommendations, Oh My!*

When advertising a business, a good word is all that's needed. But what kind of good word is the best? A recommendation? A review? And what's the difference between those and a testimonial?

Your business can be discussed in a multitude of different ways, and it's best to know these ways so that you can use them.

The one you're probably most comfortable with, a review, is information about your product or service left by a past customer. These can, of course, be good or bad and are left on a third-party website such as Google, Amazon or even Facebook. They're powerful because they're customer led. You have no power over the review someone is going to leave you except for the customer service you give them at the time, so make sure it's good!

Testimonials, on the other hand, are collected by the businesses themselves and usually proudly displayed on their websites or social media pages. They're all about the "who." Ideally, you want someone who is a celebrity or highly respected in their field to stake their name on your service.

So, what are recommendations? They're often asked for by people in a community from someone whose opinion and expertise they trust. By impressing these people, you'll find yourself with an influx of new customers.

How to collect each of these? For reviews, simply asking your clientele to leave them will help. Have an online presence so that they can find you easily.

For testimonials, build a good rapport with your repeat customers, and for recommendations, think about setting up a referral system so that word of mouth offers them something as well as you.

For each feedback option, the best thing you can do as a business is go the extra mile. Offer good customer service and take pride in your work.

## **Our office is hiring!!!**

If you know anyone who is looking for any of the following positions, please have them email their resume to Lisa.

[Lisa@cpcfinancial.com](mailto:Lisa@cpcfinancial.com)

### **Entry Level Accountant**

### **Staff Level Accountant**

### **Tax Manager Level Accountant**

### **Administrative Assistant**

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## Why Team Building Is Essential for Your Business

As soon as you say the words "team building," you shouldn't be surprised if you hear a few stifled groans coming from around the office.

Unfortunately, thanks to careless bosses and big companies that have no intention of learning from their employees, a team-building workshop sounds synonymous with a boring seminar, a trust fall and slightly warm sandwiches. Because of this, many companies have decided to forgo team building altogether.

This is a mistake. Team building can make communication better, increase collaboration between workers and also ease conflict. But it doesn't have to be like a scene from *The Office* in the office.

### **Leave the trust falls behind you**

Trust exercises seem to be the go-to for businesses that think they need a little help gelling their team, but it's not usually a lack of trust that creates the tension. Most of the time, your workers will have trouble connecting because they don't really know each other. Instead of a big day out where nothing gets resolved, try initiating a small social once a month where each of the team members' interests gets explored. Perhaps start a suggestion box for new things to try. Has someone always wanted to try salsa? Rock climbing? Beach volleyball? Try them as a team.

### **Move outside the office**

Seeing your team outside of harsh overhead lighting can work wonders. Friday-night drinks work for a lot of companies, and they could work for yours, too. Get people talking about something other than deadlines, and their communication will flow better during the 9-5.

### **Show them you care**

Is it a holiday? A birthday? A company milestone? Splash out a little bit of cash and show your employees what they mean to you. If you're wondering if your business can afford to "splurge" on your employees, think of it more as an investment. Team building doesn't end with management: it ends with the entire brand. If your employees feel cared for, they'll care for the work they do for you. At the end of the day, your brand is another member of the team.





**It's that time again! Tax season is right around the corner here is a check list so you can be prepared!**

## **2023 1040 Organizer Information Checklist**

This is a list of the most common items we'll need to prepare your returns. We'll call you if we need anything else.

- ☐ All tax return packets, mailing labels and correspondence sent to you by the various taxing agencies
- ☐ All W-2's
- ☐ All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, cancellation of debt, credit and debit card transactions, etc.
- ☐ All 1094 and 1095 forms related to health care transactions.
- ☐ All income tax information for children if you want us to prepare any required returns
- ☐ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid
- ☐ Total of charitable contributions, and details for any non-cash contributions over \$500. **All contributions must have receipts.**
- ☐ Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)
- ☐ If you bought, sold or refinanced real estate, then the 2<sup>ND</sup> page HUD closing statement for each transaction. If you sold any stock or virtual currency, we need the sale price and basis information if not provided by the broker on Form 1099.
- ☐ If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year
- ☐ If you are deducting actual vehicle expenses, please provide date of purchase (or lease) and the vehicle purchase price (or leased fair value) and all vehicle expenses such as lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.
- ☐ Copies of any federal, state or local tax correspondence received during the year
- ☐ The dates and amounts paid for **all estimated tax payments** and the amount of all refunds or rebates received
- ☐ All legal documents for formation, sale or purchase of a business during the year
- ☐ All legal documents for divorce decrees
- ☐ Voided check (not deposit slip) for account where refunds should be direct deposited (optional)
- ☐ All gambling income and loss records
- ☐ **New clients:** copies of prior year federal, state and local returns and depreciation schedules if applicable

# SmartVault

SmartVault is our online portal. If you have not accessed the portal and would like to please email [Lisa@cpcfinancial.com](mailto:Lisa@cpcfinancial.com).

<https://smartvault.com> to access SmartVault. Your email address is your username and the password is something you would have created. Remember it must be 12 digits one capital letter, one number and one special character.

**ORGANIZERS – Look in your SmartVault the first week of January for your organizer. If you would like the organizer mailed please call the office.**

## *Welcome New Clients and Thank you for Referring*

We love giving recognition to our new friends and our wonderful existing clients who are kind enough to refer their friends and relatives to us! We are all helping each other, which is the whole point.

In the couple months we were fortunate to welcome new tax clients and new business clients. They became members of our firm's accounting and financial planning family. We'd like to welcome them and thank all the people who have referred business to us.

As you may know, marketing for new clients costs a great deal of money, time and energy. We, like any business, need to get new clients to stay in business. Over the years, we have found that marketing takes away from the time we would rather be spending with you. We have learned that by encouraging you to refer your friends and relatives to us works for all of us. We help you, and you help us. Thank you.







# Identity Protection PIN

## Opt-In Program for Taxpayers



### WHAT'S NEW

**You are now eligible to voluntarily get an Identity Protection PIN that will help protect you from tax-related identity theft.**

### What is the IP PIN?

The IP PIN is a 6-digit number assigned to eligible taxpayers. It helps prevent identity thieves from filing fraudulent tax returns with stolen Social Security numbers (SSNs). An IP PIN helps the IRS verify taxpayers' identities and accept their electronic or paper tax returns for processing. The IRS issues IP PINs to confirmed identity theft victims once their cases are resolved. This process is unchanged. What is new is that any taxpayers who want an IP PIN, even if they are not victims of identity theft, may now obtain one.

### About the IP PIN Opt-in Program

Here's what you need to know before applying for your IP PIN:

- This is a voluntary program.
- You must pass a rigorous identity verification process.
- Spouses and dependents are eligible for an IP PIN if they can verify their identities.
- An IP PIN is valid for a calendar year.
- A new IP PIN is generated each filing season, which you must obtain using the online tool.
- The IP PIN tool is unavailable generally mid-November through mid-January each year.
- Correct IP PINs must be entered on electronic and paper tax returns to avoid rejections and delays.

### How to Get an IP PIN

The fastest, easiest and preferred way is by using the Get an IP PIN online tool. Here's how it works:

- Go to [IRS.gov/IPPIN](https://www.irs.gov/ippin), select the Get an IP PIN tool, verify your identity and create an account
- Your IP PIN will be revealed to you.

### Can't pass online identity proofing?

There are alternatives but there will be a delay in obtaining an IP PIN. Here's how it works:

- File Form 15227 if you have a valid SSN or ITIN, the adjusted gross income on your last filed return is below \$73,000 for Individuals or \$146,000 for Married Filing Joint, and access to a telephone. An IRS assistor will call you, validate your identity and ensure that you receive an IP PIN the next filing season.
- If you are ineligible for Form 15227, you may schedule a visit at a Taxpayer Assistance Center to request an IP PIN. You can find the TAC office closest to you with our [Taxpayer Assistance Locator tool](#) or call (844-545-5640) to schedule an appointment.

**IMPORTANT:** The IRS will never email, text or call you to request your IP PIN. Do not reveal your IP PIN to anyone but your trusted tax software provider or tax preparer. Neither your provider nor preparer will ask for your IP PIN except to complete your tax return. Protect your IP PIN from theft, especially scams.





Rich

~~✓~~

Andy

Paul

Julia

✓  
Gaby

Lina

Teddy

Zach

Sherry

Jonathan

✓  
Jim

Greg

Rick

✓  
Joe

Luanna

Nicky

Heather

Sandy

Earl

Susan

✓  
[Signature]