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Tax preparers to begin getting ready for 2023 tax season

Software, client meetings among top issues

APPLETON, Wis. (Nov. 30, 2022) – Tax industry professionals are beginning to gear up for the 2023 tax season, which will likely include an increase in client communications due to new and expiring tax provisions applicable to 2022 returns.

Among the topics of conversation with their clients will be tax planning to incorporate tax benefits of the American Rescue Plan Act, passed in August 2022, and creating an awareness that they may not receive a refund, or as large of a refund as last year, due to the number of expiring credits like the expanded child tax credit.

“The end of the year is sometimes the calm before the storm that is tax season,” said Tom O’Saben, government relations and tax content director at the National Association of Tax Professionals. “Tax pros should use this time to get familiar with their software, begin scheduling client meetings and seek out important education resources that may be needed during crunch time, such as webinars or other guidance on specific topics like the child tax credit, retirement plans, trusts, etc.”

The National Association of Tax Professionals (NATP) is planning for an increase in questions from its members about the implications of tax law change. Last month, NATP members received a pre-written newsletter that practitioners can send to their clients to alleviate some of those questions or use the information to facilitate tax planning conversations.

Another point of focus for tax firms will be creating and maintaining a data security plan. Earlier this year, the IRS released a template tax professionals can use as a starting point to guide their written data security plan implementation for their office.

Lastly, tax professionals should remember to renew their preparer tax identification number and complete any education requirements for designation renewal.

NATP [members receive](#) year-round support through industry-leading education, informative publications, business practice management resources and more.

To speak with someone further about this topic, please contact [Nancy Kasten](#) or [Samantha Strong](#).

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About NATP: The National Association of Tax Professionals (NATP) is the largest association dedicated to equipping tax professionals with the resources, connections and education they need to provide the highest level of service to their clients. 23,000 members rely on NATP to deliver professional connections, content expertise and advocacy that provides them with the support they need to best serve their clients. The NATP headquarters is located in Appleton, WI. To learn more, visit www.natptax.com.

Are you looking for a tax expert? Tom O'Saben, EA, is the director of tax content and government relations at the National Association of Tax Professionals (NATP). Tom is available for phone or video interviews to discuss federal tax topics, including tax law change and its implications, taxpayer issues, tax preparer regulation and more. To schedule an interview with O'Saben, contact nkasten@natptax.com.