

Checklist:



Get Ready for Tax Season

This practical checklist gives both admins and employees a clear roadmap to get your firm prepared and ready to win the busy season. **Click on each task for a detailed step-by-step guide.**

1 Audit Users

- ☐ [Purchase User Licenses \(Admin, Employee, Seasonal\)](#)
- ☐ [Add Users to SmartVault Account](#)

2 Update Client List

- ☐ [Add New Clients](#)
- ☐ [Invite New Clients](#)
- ☐ [Link Connected Clients](#)

3 Refresh Skills

- ☐ [Join Our Tax Readiness Webinars](#)
- ☐ [Complete Tax Season Readiness Course](#)
- ☐ [Add SmartVault Academy Certificates to LinkedIn](#)
- ☐ [Purchase a SmartHour](#)

4 Get Started

- ☐ [Add a Tax Year 2026 Folder to Each Client Vault](#)
- ☐ [Share Guest User Video Walkthrough with Your Clients](#)

5 Get Expert Guidance

Book a one-on-one session with a Customer Success Manager if you'd like to discuss add-ons, integrations, or features that support your firm's goals.

[SCHEDULE NOW](#)



+ Dig Deeper

FAQs: Daily Workflows

- ▷ [Requesting Docs](#)
- ▷ [Printing Tax Returns into SmartVault](#)
- ▷ [Sharing Tax Returns with Clients](#)

Know Your Resources

- ▷ [SmartHub](#)
- ▷ [Help Website](#)
- ▷ [SmartVault Academy](#)
- ▷ [SmartVault Video Library](#)