

TAX RETURN DEADLINE PROVIDES AN OPPORTUNITY TO BETTER UNDERSTAND THE NEEDS OF YOUR CLIENTS

LONDON, UNITED KINGDOM, February 1, 2024 /EINPresswire.com/ -- Helping the owner managed business sector meet the January 31st filing deadline provides a great opportunity for accountants to identify where they can provide additional support to their clients.

“

Tax return time is an excellent opportunity to gather more data on our clients – their wider financial position and objectives and identify where they will need your services in the year ahead.”

Johnny Ridd, CEO

Which is why RQ, a technology company, has recently launched Compass - a diagnostic tool that surfaces insights on clients; unearthing their needs, goals and aspirations.

Johnny Ridd, Chief Executive Officer, RQ, said:

“Owner managed businesses reach out to their accountants in January for help with personal tax filing. This represents an excellent opportunity to gather more data on our clients – their wider financial position and objectives and identify where they will need your services in the year ahead.

“Distributing Compass to all of your clients takes seconds and the insights you get means you can offer a wider range of services and support. Crucially, it doesn’t add to accountancy firm’s workloads and avoids what can sometimes feel like an awkward conversation with a client about their personal financial situation, their family and so on – the tool aggregates that all for you.”

Accountants who understand their clients' personal financial goals and objectives can better anticipate need, offer more comprehensive advice, and deliver more value for clients. Compass works by enabling accountants to generate actionable insights around these client needs.

To find out more about Compass and how RQ can help you build professional networks and collaborate more effectively on behalf of your clients go to: www.rqratings.com

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