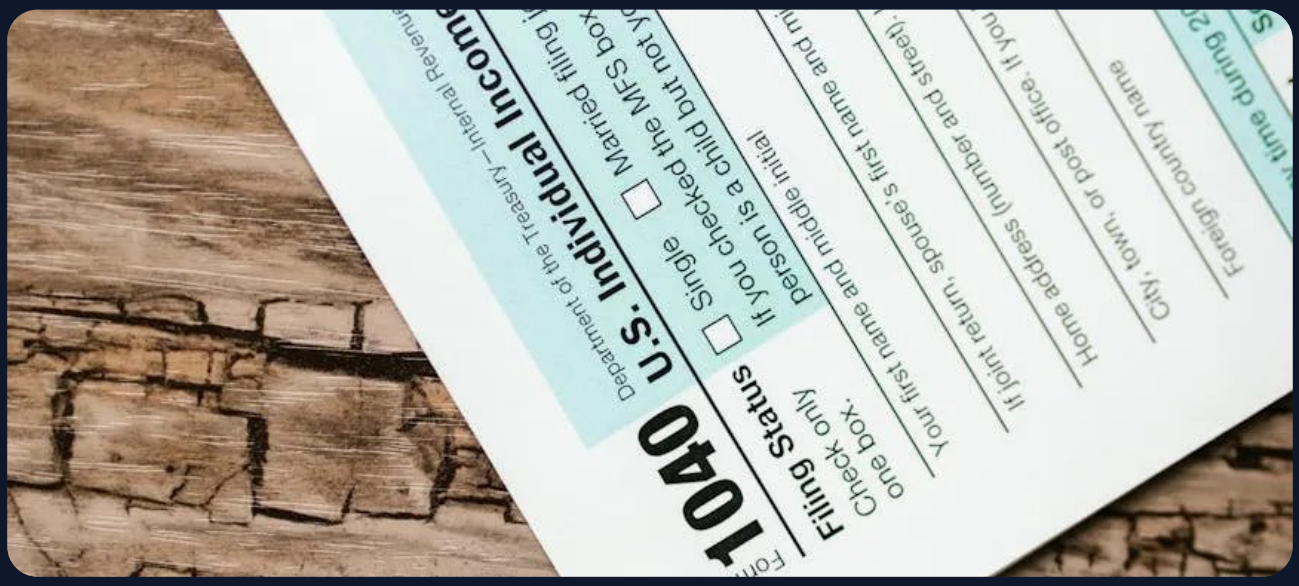
RISK ASSESSMENT WIZARD



TAX ADVISORY

Safety Guide

Financial Services

4	16	3
Key Benefits	Control Measures	Checklist Items

KEY BENEFITS

Tax Minimization

Minimizes tax liabilities through strategic planning.

Compliance

Ensures compliance with tax laws and regulations.

Opportunities

Identifies opportunities for tax savings and refunds.

Audit Protection

Mitigates risks of penalties and audits through accurate filings.

KEY HAZARDS & CONTROL MEASURES

Regulatory Non-compliance

- ✔ Continuous regulatory monitoring
- ✔ Professional development programs
- ✔ Quality review procedures
- ✔ Peer review processes

Inaccurate Tax Advice

- ✔ Research documentation requirements
- ✔ Senior review of complex matters
- ✔ Professional liability insurance
- ✔ Engagement letter clarity

Data Breaches

- ✔ Encrypted file storage
- ✔ Secure client portals
- ✔ Access control policies
- ✔ Regular security training

Tax Law Changes

- ✔ Tax law update subscriptions
- ✔ Regular staff training
- ✔ Professional association membership
- ✔ Knowledge management systems

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Create professional, customized risk assessments for your organization with our easy-to-use online wizard.

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Pre-loaded hazards & controls for every activity

100%

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Add your branding & tailor to your needs

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