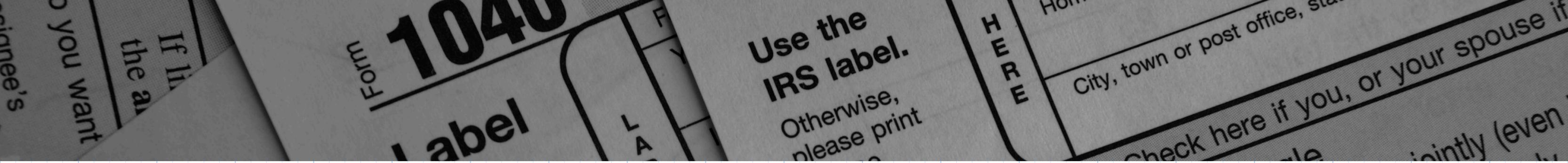


**ELG**  
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# **THE TAX SEASON DELEGATION BLUEPRINT: What to Keep In-House and What to Outsource**

**Brought to you by ELG Solutions**

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Every year, tax season pushes accounting firms and CPAs to their limits. The hours get longer, client emails pile up, and deadlines seem to close in all at once.

But what if your firm could handle more clients, more efficiently, without overworking your team or hiring additional full-time staff?

- ✓ Which accounting tasks you should keep **in-house**, and
- ✓ Which ones you can **confidently delegate** to a trusted outsourcing partner.

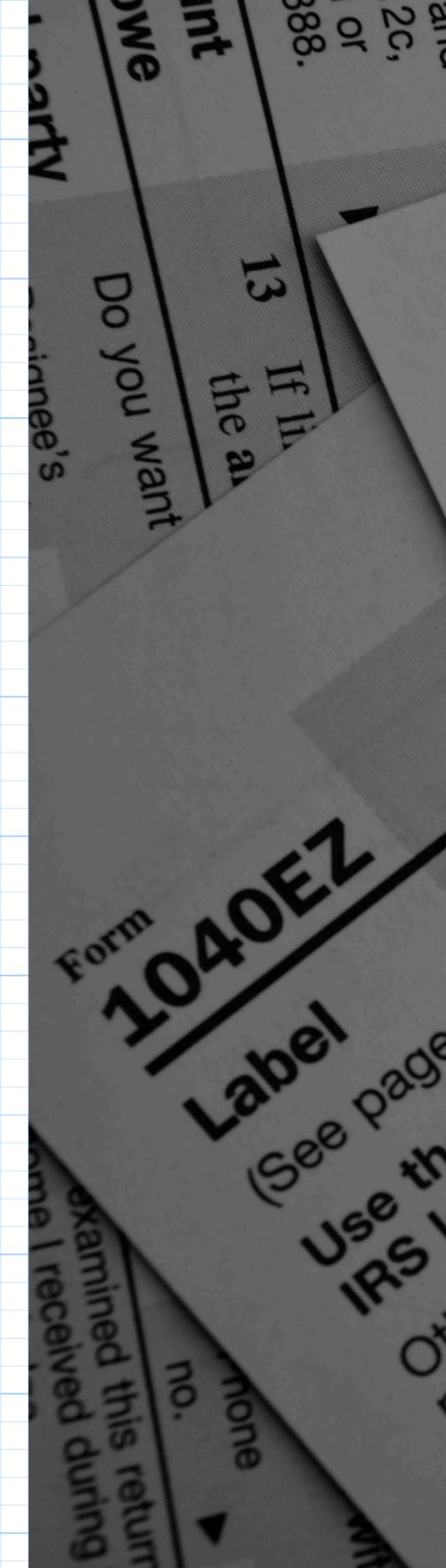
By the end, you'll have a clear delegation plan that keeps your operations smooth, your team focused, and your clients satisfied.

# WHY DELEGATION IS THE KEY TO SURVIVING TAX SEASON

When deadlines are non-negotiable, the firms that thrive are those that know what to let go of. Delegation allows you to:

- Focus your core team on **high-value tasks** (like tax strategy and client consultations).
- Reduce burnout from repetitive, manual work.
- Deliver faster turnaround without compromising accuracy.
- Scale your capacity without long-term hiring commitments.

Think of delegation as strategic leverage, not giving up control, but freeing your experts to do their best work.



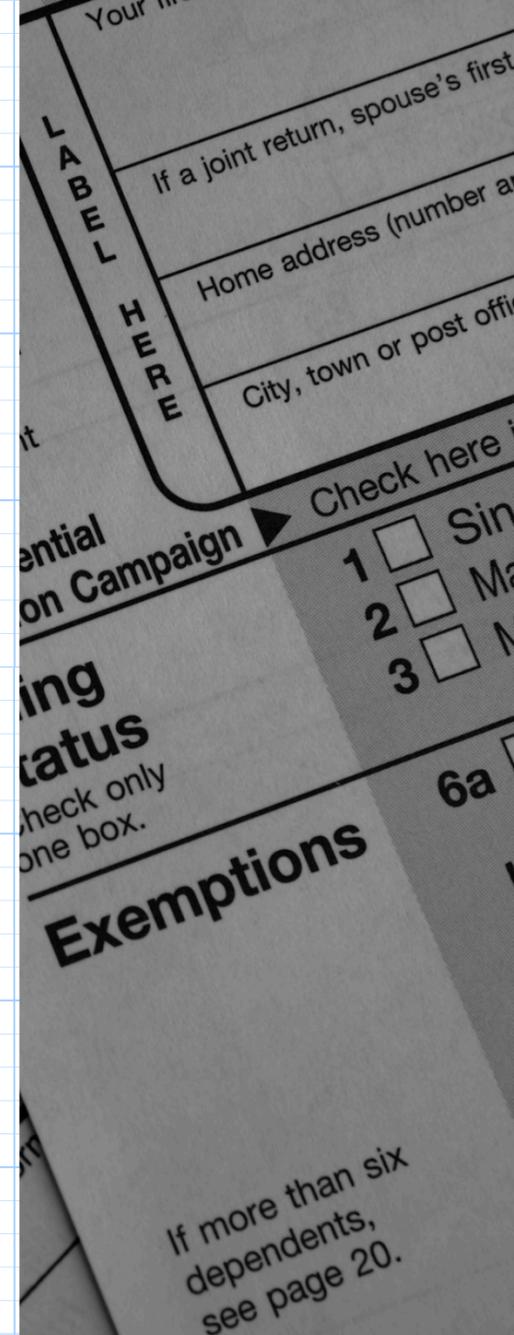
# The Decision Framework

## What to Keep vs. What to Delegate

Here's a simple framework you can apply to every task in your workflow:

Question	Keep It in-House	Outsource it
Does this task require direct client interaction or advisory judgment?	YES	NO
Does it involve strategic tax planning or compliance sign-off?	YES	NO
Is it repetitive, rules-based, or data-heavy?	NO	YES
Could someone else do this with proper training and SOPs?	NO	YES
Would outsourcing this task save time without risking quality?	NO	YES

Use this filter to build your own delegation map, a clear list of what stays in your firm, and what you can confidently delegate to a support team like **ELG Solutions**.



# Common High-Burden Tasks Ideal for Outsourcing

*During tax season, certain tasks tend to eat up the most time, but don't actually require senior-level expertise. Here are the top candidates for outsourcing:*

## **Accounting & Bookkeeping Tasks**

- Bank reconciliation and ledger maintenance
- Accounts payable and receivable tracking
- Expense categorization and data entry
- Trial balance preparation

## **Tax Preparation Support**

- Gathering and organizing client documents
- Initial data entry for tax returns
- Schedule preparation and workpaper creation
- Cross-checking forms and entries for accuracy

## **Reporting & Analysis**

- Monthly, quarterly, and annual financial reports
- Management reports and KPI tracking
- Data clean-up and formatting for client presentations

## **Administrative & Client Support**

- Email follow-ups for missing documents
- Updating client information
- Organizing folders and maintaining records

*Each of these tasks can be handled by a trained remote professional, freeing CPAs and managers to focus on client advisory, compliance reviews, and quality assurance.*

# Time-Savings Calculator

*Let's visualize how outsourcing affects your time.*

Task	Average Time (Per Week)	If Outsourced (Saved Hours)
Data entry and reconciliation	10 Hours	8-10 Hours Saved
Report formatting and analysis	6 Hours	5-6 Hours Saved
Tax workpaper preparation	8 Hours	7-8 Hours Saved
Client follow-ups and admin	5 Hours	4-5 Hours Saved

***Total Estimated Time Saved: 25-30 hours/week***

*That's nearly a full-time employee's workload recovered, without adding too big to your payroll.*

# How ELG Solutions Helps You Delegate with Confidence

At **ELG Solutions**, we specialize in helping accounting firms and CPAs **scale smoothly during tax season** by providing:

- **Trained accounting professionals** familiar with U.S. and International accounting standards.
- **End-to-end support services**, from bookkeeping and reconciliation to report generation and client coordination.
- **Seamless integration** with your existing team and workflow tools.
- **Flexible engagement models**, so you can scale up or down as needed.

Our professionals act as an extension of your in-house team, not replacements, helping you meet deadlines, reduce stress, and deliver consistently excellent results.

# Start Building Your Delegation Plan

Here's your action checklist to prepare for tax season:

- ✓ List all repetitive, time-consuming tasks in your workflow.
- ✓ Identify which can be delegated using the decision framework.
- ✓ Estimate your team's current weekly hours — then calculate your potential savings.
- ✓ Schedule a discovery call with ELG Solutions to explore custom outsourcing support.

Delegation isn't about losing control — it's about *gaining capacity*.

By strategically outsourcing your high-volume, low-touch tasks, your firm can focus on what truly matters: **delivering expert guidance, meeting deadlines, and growing your client base.**

Let this tax season be the one where your firm works smarter, not harder.

# Ready to Delegate Tasks with Confidence?

Our trained professionals act as an extension of your team, without the full-time cost!

[BOOK A DISCOVERY CALL](#)

Visit our website to learn how we can help you scale your accounting operations this tax season.

[LEARN MORE](#)

