



CSS Quarterly Compliance Compass

Q1 2026

Tax Season Focus

As we enter the 2026 Tax Season, this quarter's Compliance Compass is centred on **PRECISION, ACCOUNTABILITY, AND EXECUTION** during one of the most demanding periods of our year. Tax Season represents more than a statutory deadline. It is a defining moment for how our clients experience Crawford Smith & Swallow. The quality of our work, the clarity of our communication, and the consistency of our processes are all on display, often under tight timelines and heightened expectations. This period requires focus, discipline, and a shared commitment to doing things right the first time.

Throughout the Firm, we are balancing complex technical requirements, evolving legislation, and increased client inquiries. Success during this quarter depends not only on individual effort, but on how effectively we work together. Clear handoffs, timely reviews, and open communication across departments are essential to maintaining quality and reducing pressure points as volumes increase.

THIS QUARTER, OUR COLLECTIVE FOCUS IS ON:

- Maintaining accuracy and consistency across all tax filings and related deliverables.
- Communicating clearly and proactively with clients, particularly where timelines or complexity may create pressure.
- Identifying issues early and escalating appropriately to avoid downstream risk.
- Supporting effective workflow management, including realistic scheduling and timely reviews.
- Protecting quality, documentation, and compliance at every stage of the process.

The Compliance Compass also serves as a reminder of our responsibility to uphold the highest professional and ethical standards.

ACCURACY, DOCUMENTATION, & COMPLIANCE are non-negotiable, particularly during Tax Season when the margin for error is narrow.

Behind every filing deadline is the whole CSS team, enabling the work, administration, IT, HR, and leadership, ensuring systems are stable, resources are available, and support is in place. Tax Season highlights the importance of that collective effort and reinforces the value of a **ONE FIRM, ONE TEAM** approach during peak demand.

As always, the Quarterly Compass is intended to provide clarity on priorities, reinforce alignment across the Firm, and support you in navigating the months ahead. Thank you for your professionalism, resilience, and continued commitment to our clients and to one another as we move through Tax Season together.

**Built on Trust.
Powered by People.**

