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## New Year IT Planning



### TECHNOLOGY TIPS

**By Marc Umstead,  
Plus 1 Technology**

As we begin the calendar year, many firms are looking towards tax planning and budget planning for the next year. We recommend meeting with your IT provider at least twice a year to discuss your needs. For larger firms it may be quarterly or even monthly. Here are some items to consider for new year planning and for budget creation:

• Hardware replacement – Your IT provider should be providing a report indicating the age and recommended replacement cycle for

all your desktops, laptops, and servers.

• Software changes – Is your firm looking to make any changes to the software solutions it uses? This could be a change in your industry (line of business), accounting, or other management software.

• Security enhancements – Is your firm looking to improve cyber security or ensure compliance?

• Projects – Are there any special projects your firm is looking to take on this year or next? These can be items such as migrating to the cloud, enabling better mobility, or infrastructure improvements.

All these items should be considered when determining new year planning and creating budgets for the next year.


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