

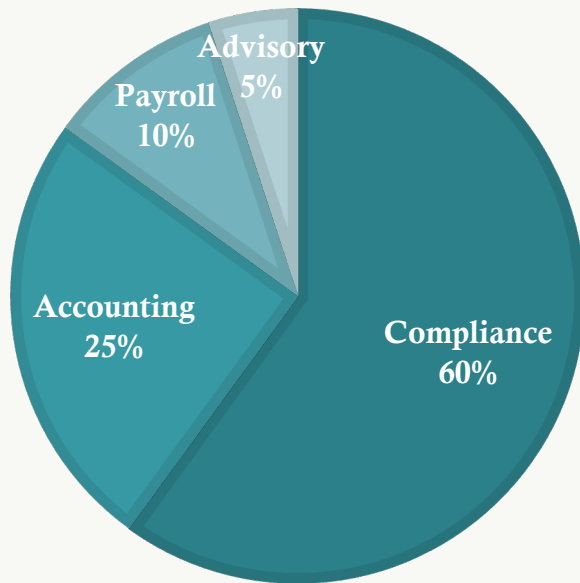
# Transitioning Clients to Advisory During Tax Season



# TRANSITIONING TO THE RIGHT “SERVICE MIX”

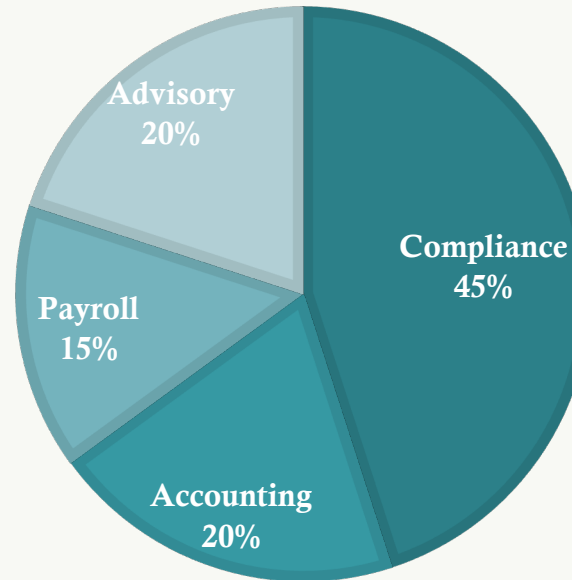
## OLD APPROACH

■ Compliance ■ Accounting ■ Payroll ■ Advisory



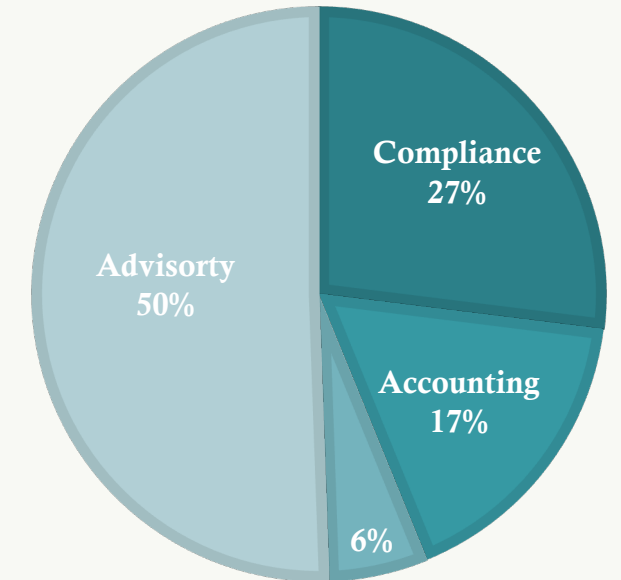
## SHORT-RUN

■ Compliance ■ Accounting ■ Payroll ■ Advisory

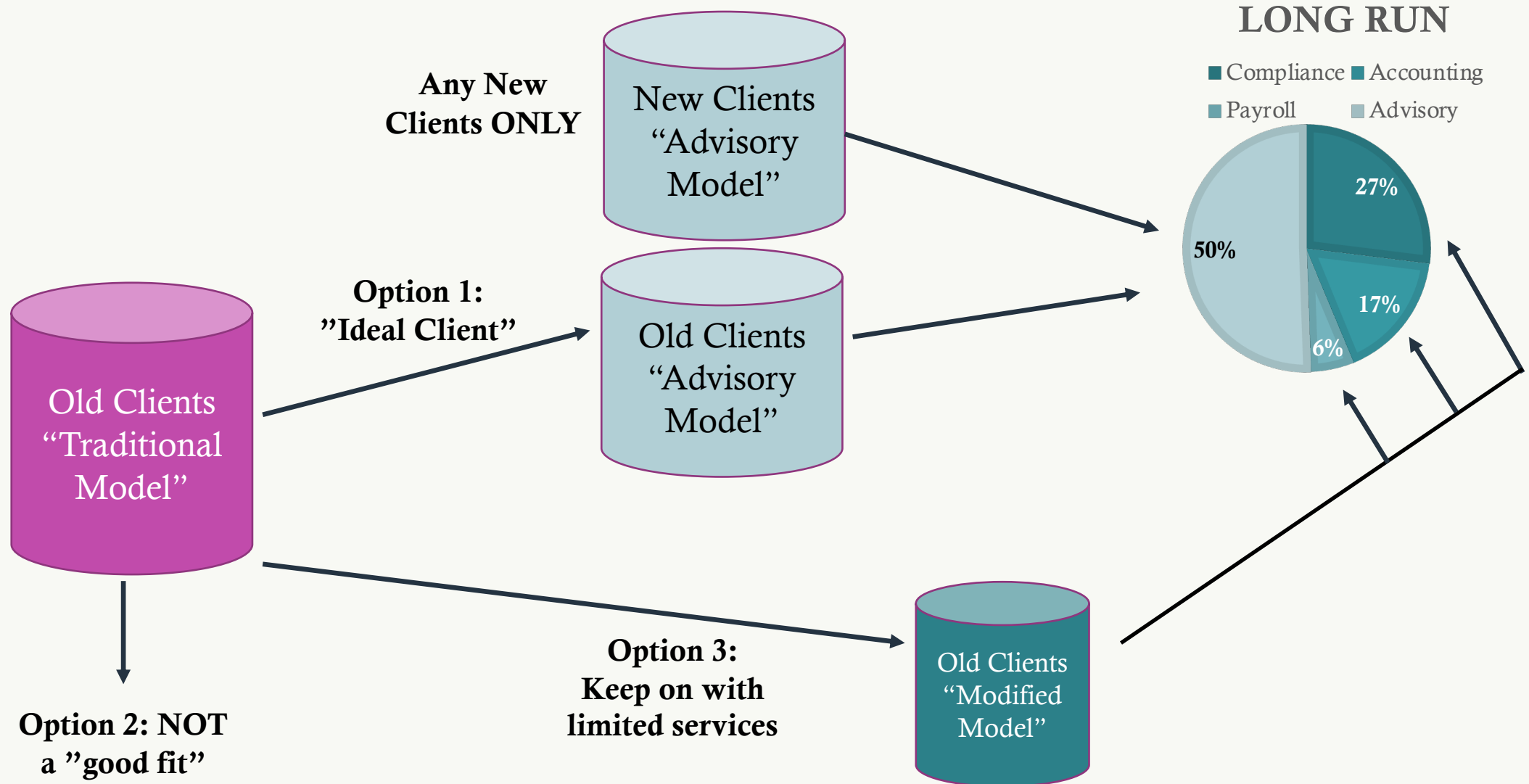


## LONG RUN

■ Compliance ■ Accounting ■ Payroll ■ Advisory



# TRANSITIONING CLIENTS THRU THE PROCESS



# IDENTIFY IDEAL CLIENTS

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- A small business
- A side hustle
- Rental real estate
- A 1099 of X or larger
- Have goals to buy real estate
- Goals to leave their day job
- Trying to build wealth
- They have additional income from a farm, Etsy, Uber, Turo, Waverly, Ebay, etc.

# WHAT IS THE PITCH?

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Point out a combination of several things depending on the client:

- I've recently become a Certified Tax Advisory with a whole new approach to tax planning
- I KNOW I can save you more if we take a proactive approach to 2024
- I have SO MANY more strategies than just saving taxes that will enhance your wealth
- I know we've wanted to meet more often and I would like to formalize a process that we both can rely on to make this happen
- I propose an 'advisory relationship' where we meet monthly or quarterly and all of your accounting needs are handled for the entire year with a monthly fee you can budget for and makes it a "win win"

# THE PITCH

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## Option 1:

Pitch when you meet to review their 2023 Tax Return.

Have a price and an Engagement Letter ready to go

Start monthly payments April or May 1<sup>st</sup>.

Include a Comprehensive Planning Session to kick it off.

## Option 2:

Schedule a Call for May and a "Comprehensive Annual Plan and Review"

Charge for the Plan and pitch the Advisory Price on that Call.

## Option 3:

Tell them you'll be contacting them in the future

**Worst!!**

Tax Pro  
Module 13  
Section 4

Thank you!!

