INTUIT Tax Advisor

Marketing Kit

for Tax Advisory Services

Inside you will find links to articles, videos, podcasts, and Google Sheet and Google Doc templates designed to help you start marketing your tax advisory services to clients.

We recommend saving a copy of this Marketing Kit to your computer now

The purpose of this Marketing Toolkit is to give you confidence to engage your clients in tax planning and advisory services. With the user-friendly table of contents, you can click on and jump right into the sections that interest you. And the easy-to-use templates make it easy to adopt and go. Whether you're new to tax advisory services or looking to update your fees and services, this toolkit has everything you need to confidently introduce these valuable services to your clients, update your pricing, engage clients, and schedule meetings.

Please note that while this toolkit does not provide **Intuit Tax Advisor** product training or tax strategy training, we have additional resources available in **Intuit Tax Advisor**, on our training website, and through your business consultant.

CLICK TO DOWNLOAD A PRINT FRIENDLY VERSION

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Using this toolkit

You can **jump to any section** in this marketing kit by clicking on it in the table of contents. Throughout the marketing kit, you will find Google Sheet and Google Doc templates that can be copied to your firm or personal Google drive. After making a copy, you can then edit the content to support your firm's specific activities and goals.

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How to identify tax advisory clients

HOW TO DECIDE THE RIGHT CLIENTS FOR TAX ADVISORY

Most firms launch tax advisory services with existing clients who already know, trust, and pay for compliance services.

Here are some attributes to look for when trying to decide which prospects are right for tax advisory services:

- Clients with businesses, including rental real estate services, because there are so many tax-saving strategies available.
- Clients already paying for planning and advisory services, whether from your firm or other professionals.
- Clients who have experienced significant life changes such as marriage, divorce, or retirement.
- Clients with a high net worth or complex tax situations that require specialized knowledge and expertise.
- Clients who value personalized attention and are willing to invest in professional services.

HOW TO EVALUATE YOUR CLIENT LIST

Start with an ABC analysis of clients

In the previous section, we presented some of the criteria for determining who might be right to start offering services to. One quick method for evaluating your entire client list is to prepare an ABC analysis based on the fees received from each client during the past year. Here's how:

1. Export your client list and the approximate fees for a year from your billing system.
2. Sort the client list by annual revenue to the firm, from highest to lowest, to rank clients by revenue for segmentation.
3. Count the number of clients and divide them into A, B, C segmentations, as follows:
    - Your A clients are the top 20% of clients when sorted by revenue. For example, if you have 100 clients, mark the first 20 as A clients.
    - Your B clients are the next 40% of clients
    - Your C clients are the bottom 40% of clients

Add your sorted client list to this template to further evaluate your clients. Remember to save a copy of the template to your personal Google Drive or your firm's drive in order to use it.

CLICK FOR TEMPLATE TO IDENTIFY TAX ADVISORY CLIENTS

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TIPS FOR COMPLETING YOUR CLIENT LIST EVALUATION

Use the same template you used to segment your client list. Remember to save a copy of the template to your personal Google Drive or your firm's drive in order to use it.

CLICK FOR TEMPLATE TO IDENTIFY TAX ADVISORY CLIENTS

- Starting with your A clients and working down the list, estimate the range of total income for each client. If you want to be more specific than the template provides, you can personalize the values on the 'List' tab.
- Use **Intuit Tax Advisor** to quickly estimate the potential tax savings from 3 to 5 of the highest impact strategies for the client.
- In some cases, you may want to use **Intuit Tax Advisor** | Client Report | Proposal to position your new fees against an estimate of the tax savings. The key is quantifying and communicating the tax savings. Clients don't know your value unless you can clearly articulate it to them.
- Use the client template below as a starting point to begin meeting with your best clients who will benefit from your tax advisory services.

Example

#	Client name	Prior year fees (sort from high to low)	Client segment	New bundled services fee proposal	Estimated client income	Estimated tax savings	Reviewed ITA Plan
1	**Bob Sanders**	8,000	A		$1M and higher	$100k and higher	☐
2	**Larry and Linda Lawyer**	8,000	A		$1M and higher	$100k and higher	☐
3	**John Doe**	6,000	A		$501K to $1M	$51K to $100K	☐
4	**Client Name**	5,000	A		$501K to $1M	$51K to $100K	☐
5	**Client Name**	3,000	B		$251K to $500K	$21K to $50K	☐
6	**Client Name**	2,500	B		$251K to $500K	$21K to $50K	☐
7	**Client Name**	2,500	B		$100K to $250K	$21K to $50K	☐
8	**Client Name**	2,200	B		$100K to $250K	$21K to $50K	☐
9	**Client Name**	1,800	B		$100K to $250K	$21K to $50K	☐
10	**Client Name**	1,500	B		$100K to $250K	$21K to $50K	☐
11	**Client Name**	1,500	B		$100K to $250K	$21K to $50K	☐
12	**Client Name**	1,500	C		$100K to $250K	$21K to $50K	☐
13	**Client Name**	1,200	C		$100K to $250K	$21K to $50K	☐

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How to communicate your tax advisory services

HOW TO ANNOUNCE TAX ADVISORY SERVICES TO CLIENTS

This template can help you notify clients you are changing your services to include tax planning services. Remember to save a copy of the template to your personal Google Drive or your firm's drive in order to use it.

CLICK FOR TEMPLATE TO ANNOUNCE ADVISORY SERVICES TO CLIENTS

Important notes:

- When it comes to introducing new services to your clients, clear communication is key. By explaining the change in a straightforward manner, you can avoid any unnecessary emotions and the feeling of having to "sell" the new services.
- One best practice is to use a calendaring application, such as Calendly, to allow clients to self-manage their appointments. This can help ensure that recurring proactive planning meetings are scheduled regularly, keeping books current and avoiding any surprises.
- Pricing is typically discussed in the conversation when the client chooses which level of service they want, rather than in any emailed communication.

HOW TO ANNOUNCE TAX ADVISORY + ACCOUNTING SERVICES TO CLIENTS

If you are offering accounting and payroll services to the client, this template announces tax planning and advisory services along with prescribing a collaborative cloud workflow using QuickBooks Online. Remember to save a copy of the template to your personal Google Drive or your firm’s drive in order to use it.

CLICK FOR TEMPLATE TO ANNOUNCE ADVISORY PLUS ACCOUNTING SERVICES

Important notes:

- Many firms that offer tax planning and advisory services find it efficient to collaborate with business clients using QuickBooks Online. They are better able to help clients keep books current, avoid tax season cleanup work, and unnecessary surprises.
- In addition, QuickBooks Online also automates much of the transactional compliance work, freeing up valuable time for clients.
- Pricing is typically discussed during the conversation when the client chooses which level of service they want, rather than in any emailed communication.

HOW TO USE IGNITION TO AUTOMATE YOUR ENGAGEMENT LETTER PROCESS

Ignition is a tool that helps streamline the way you engage with your clients by having one place to propose tax advisory services, get client signatures for new engagements, collect their payment information, and initiate subscription billing. It automates much of the setup and maintenance so you can focus on delivering your tax advisory services. To learn more about Ignition, go to https://proconnect.intuit.com/ignition/

TALKING POINTS TO POSITION YOUR TAX ADVISORY SERVICES WITH CLIENTS

This script is designed to assist you in effectively communicating the value of tax planning to your clients in order to help them realize their goals. Save a copy of the script to your personal Google Drive or your firm's drive in order to use it.

CLICK FOR SAMPLE SCRIPT TO POSITION YOUR TAX ADVISORY SERVICES WITH CLIENTS

There are various ways to present and position your tax advisory services. Here are a few examples of how different firms position their tax planning and advisory services:

- We include tax advice with tax preparation.
- We offer tax planning and advisory as an optional service when clients request it.
- We evaluate your tax situation and sell a tax plan with tax strategies and recommendations.
- We require clients to engage in planning services as part of our tax services.
- We are making changes to our services to better serve you, including tax planning with each level of service.

Most tax advisors avoid 'selling,' and there are ways to position your services without feeling like you are selling. In this guide, we focus on the last approach above.

Adapt these resources to support your style and help you confidently present and position your tax and advisory services.

A LETTER FOR INTRODUCING ADVISORY SERVICES TO YOUR TEAM

It's important that everyone at your firm understands what tax advisory services are and why you are now offering them. This document can be used to explain tax advisory to employees in your firm.

Instructions: Save a copy of the template to your personal Google Drive or your firm's drive. After making a copy, you can then edit and adjust for your firm.

CLICK FOR TEMPLATE TO INTRODUCE ADVISORY SERVICES TO YOUR TEAM

A TEMPLATE FOR TAX ADVISORY SERVICES ENGAGEMENT LETTER

One of the best ways to update your services, pricing, and processes is to update your engagement letter with clients.

This Tax Advisory Services Engagement Letter may look different from traditional engagement letters–that is by design. We used more client-friendly formatting and less hard-to-understand legalese. We also explain the process changes for your tax services, which is often an area that is not well communicated to clients. The goal is to align expectations and behaviors for a smoother experience.

Save a copy of the template to your personal Google Drive or your firm's drive. Copy and personalize the template to fit your firm.

CLICK FOR TEMPLATE OF TAX ADVISORY SERVICES ENGAGEMENT LETTER

HOW TO USE VIDEO TO ANNOUNCE YOUR ADVISORY SERVICES

A best practice by some firms looking to announce the update of their services is to create a video to share with clients. Video can be more engaging than email or written communications.

Creating a video is also a good opportunity to engage new technologies as you launch new services. Use this template as a starting point to personalize your message to clients.

CLICK FOR TEMPLATE OF VIDEO SCRIPT TO ANNOUNCE TAX ADVISORY SERVICES

Save a copy of the template to your personal Google Drive or your firm's drive. After making a copy, you can edit it. Practice with team members. Then record using Loom, Zoom, a phone camera, or other recording app. .

When finished, email the video link to customers you plan to engage in tax planning and advisory services.

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How to update your pricing

A TEMPLATE FOR UPDATING TO SUBSCRIPTION BILLING

Did you know that firms that communicate tax savings are able to charge higher fees than those who don't? Research shows that the average fee for tax planning and advisory services is $2,351 per client, per year.

If you're happy with your current billing model, feel free to skip this section. There's nothing wrong with transactional billing, and most of the profession does it. However if you want to update your fees to better reflect the value of your expertise and move to subscription billing, this template can help. Save a copy of the template to your personal Google Drive or your firm's drive in order to use it.

CLICK FOR TEMPLATE ON HOW TO UPDATE TO SUBSCRIPTION BILLING

Remember, what you do is extremely valuable and you should be paid fairly for it. Don't let clients dictate your value. Use our pricing worksheet to estimate fees for three bundles of services based on what you charged each client in the past year. Breaking down annual fees into monthly fees makes budgeting easier for businesses.

Moving to negotiated subscriptions can save time and resources, simplify invoicing and billing, and allow you to focus on delivering better services. Differentiate your services and get paid for your value.

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Client email templates

EMAIL TEMPLATE FOR SCHEDULING INITIAL TAX ADVISORY APPOINTMENT

Email is an essential tool to connect with clients, providing a direct and efficient way to share information, resolve issues, and build strong relationships.

We have included email templates designed to help you schedule your first tax advisory appointment with clients, including scheduling an initial meeting, an appointment reminder email, and a follow-up email.

Instructions: Save a copy of the template to your personal Google Drive or your firm's drive. After making a copy, you can then edit the emails to support your activities, adjust them for your firm, and then copy and paste them into your email program to share with clients.

CLICK FOR TEMPLATE FOR INITIAL TAX ADVISORY EMAIL CAMPAIGN

YEAR-LONG EMAIL CAMPAIGN TEMPLATE

These emails are designed to be sent to clients throughout the year to encourage them to book an appointment and discuss tax advisory services. We have included a template for a four-email campaign, but you can customize the number and frequency of emails to suit your needs.

Instructions: Save a copy of the template to your personal Google Drive or your firm's drive. After making a copy, you can then edit the emails to support your activities, adjust them for your firm, and then copy and paste them into your email program to share with clients.

CLICK FOR TEMPLATE FOR YEAR-LONG EMAIL CAMPAIGN

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Additional resources

ADDITIONAL RESOURCES

Want to go deeper into tax advisory or learn from others who are successfully integrating it into their firms? These resources are a great place to start.

Learn from your peers in these engaging videos:

- Why they offer tax advisory services
- Why they chose Intuit Tax Advisor

View tax strategy videos by Dominique Molina, CPA and President of the American Institute of Certified Tax Planners.

Tap into a playlist of tax advisory podcasts, including testimonials and coaching on pricing your services.

Get free tax advisory training on how to unleash your potential with advisory services

Review articles on overcoming concerns and objections about new services:

- 5 top tax advisory myth busters
- How to overcome client hesitations when it comes to advisory services

Tap into tips, tricks, and advice on advisory from our Tax Pro Center

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SEE ALL TEMPLATES

Below you will find a main list of all template available in this marketing kit

Template to identify tax advisory clients

Template to announce advisory services to clients

Template to announce advisory plus accounting services

Sample script to position your tax advisory services with clients

Template to introduce advisory services to your team

Template of tax advisory services engagement letter

Template of video script to announce tax advisory services

Template on how to update to subscrption billing

Template for initial tax advisory email campaign

Template for year-long email campaign