



ADDING VALUE DURING TAX SEASON

If you want to grow your practice, expand your services and increase the value you provide to your clients, make sure you communicate your value to clients during tax season.

Clients may think of you as their “tax preparer” and may only consider your services to file tax returns. However, most tax professionals have amazing financial acumen and are capable of helping clients with many parts of their financial lives, including tax saving strategies, retirement planning, employee management, budgeting, forecasting, and cash flow management. The same clients who pay for convenience and confidence to file a return may be willing to pay for additional services. Current clients can also be the best source of growth because they already use your services through an existing, established and trusting relationship.

Tax season is the best time of the year to convert annual transactional clients into planning and advisory clients. It’s important to position tax strategy, planning, and advisory as separate engagements from tax preparation. Using the Industry Data with Company Comparisons report within ProfitCents can quickly uncover weaknesses when working with tax clients. Providing this information proactively to your clients can spur advisory conversations beyond the tax deadline. For more information, contact us at profitcents.support@abrigo.com.



“ When your firm leads with planning and advisory services, your team can shift from reactive compliance to proactively helping clients reach their goals. *Cindy Thompson*
Customer Success Manager ”

