

Five Key Message Points to Position CPAs and Your Firm as the Premier Provider of Tax Services

1. Remind clients that CPAs are uniquely qualified to make sense of complex tax laws and regulations, and provide actionable ideas for individuals and businesses.

Amid a steady stream of new and evermore complicated tax rules, the client's trusted business advisor—the CPA—can offer understandable advice on the many facets of their individual and business tax situation. CPAs are highly trained and experienced professionals who offer the kind of broad business knowledge and financial expertise that clients can use to make smart decisions on taxes and a range of other financial issues. CPAs have both a meticulous understanding of financial issues and a big-picture view of the steps needed to achieve financial success.

2. Reinforce the three “e’s.” CPAs provide an unmatched level of education, expertise and experience. Then tie these points to specific examples that demonstrate how your firm is uniquely prepared to handle the diverse tax and financial concerns of your clients.

3. Explain your value. This may be different for every firm. You might say it's your client service – how your firm manages each account. Perhaps it's the breadth of services you offer to address a full range of client needs, so a client receives comprehensive, expert financial advice from your firm. Or maybe it is how you see beyond the numbers on the client's tax return and ask questions to gain insight into your client's financial situation. You then translate those insights into a solid, objective plan of action. And the result is peace of mind for your clients.

4. Let clients and prospective clients know that you offer more than tax preparation services and are available year-round. Your firm provides value well beyond the completion of a tax return. Whether clients are planning for their family's future, or thinking about the long-term health of a business, you can provide expert guidance and advice throughout the year. By combining unrivaled education, knowledge and experience with a focus on their financial situation, your firm can recommend sound strategies to help make their goals a reality.

5. Emphasize the importance of relationships. As their trusted financial advisor, you work tirelessly on behalf of your clients to address all of their important concerns with objectivity and integrity. You care as much about their business or personal endeavors as they do, sometimes more so (or at least it seems). You monitor the news and latest developments and regularly scan your client base to make sure key clients are informed of significant changes. [Consider using social media to leverage that connection and communicate in a casual style to reinforce the importance of staying connected and simultaneously deepen the bond.]