AICPA Personal Financial Planning Section

Use Your Current Client Base to Generate More Revenues, Attract New Clients and Create Clients for Life

Presented by
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Agenda for Today

- The CPA "Edge"
- How to Become Your Clients' Most Valuable Advisor and Attract New Clients
- How to Increase Your Revenues
- Choosing Additional Areas of Advice to Provide
- How to Work Most Efficiently

The CPA "Edge"

- You are likely your client's most trusted advisor
- You are a licensed professional
- You are considered an objective voice
- You work on a fee basis – no surprises

Your Clients' Current Situation

- Your clients have multiple advisors working independently from one another
- Your clients need someone to oversee that they are receiving the most appropriate financial advice
- Many of your clients would reap huge benefits from a cohesive financial or wealth management plan

Why You Should Provide More Services

- The more services you provide to your clients, the more indispensible you become
- Your client's financial life can be simplified
- Your clients can have a true advocate
- You can become your clients' most valuable advisor

Which Areas of Advice Should You Choose to Handle Yourself?

The areas you would both:

- Enjoy delivering and
- Be competent at delivering

How to Become Your Clients' Most Valuable Advisor

MODEL #1:

- Choose the areas of financial advice you will provide
- Build a team of other professionals to handle the rest
- You coordinate and oversee the entire team

How to Become Your Clients' Most Valuable Advisor

MODEL #2:

- You do not provide ANY additional areas of advice (other than taxes)
- Build a team of other professionals to provide the rest
- You coordinate and oversee the entire team

Increase Your Revenues

- Bill by retainer or by project
- Stop billing by the hour!
  (It's a pain and clients don't like it)
- Retainers help you manage expectations on the front end
- Creates recurring income for the firm

Possible Areas of Advice to Provide

- Investment Planning
- Retirement Planning
- Insurance Planning
  - Life
  - Property & Casualty
  - Disability
  - Long Term Care
  - Liability
  - Business
- Estate Planning
- Social Security
- Cash Management
- Medicare
- Business Growth
- Business Succession

Which Clients Should You Approach?

- The tax return is your goldmine
- Identify the clients that could potentially use advice in additional areas
- Invite them for a complimentary meeting to discuss further

Which Clients Should You Approach?

- Continue a discussion with your clients to identify the areas they are interested in exploring further
- Explain the business model you have chosen and your role

Deliver Your Advice Efficiently

- You must have a system in place
- This includes documented workflows and the corresponding procedures
- Various tasks are assigned and mastered by each staff member
- Keeps the office running smoothly & efficiently

Putting It All Together

- Choose your model and your team of professionals
- Hand pick your clients
- Create your delivery system (workflows)
- Begin meeting with clients (sample script will be provided to you)

Announcing a New Partnership!

Fox Financial Planning Network™

AICPA Personal Financial Planning Section

You don't need to start from scratch!

A quicker path to higher revenues, happier clients and working more efficiently.

We'll help you build your "perfect practice."

A Shortcut for You!

- Things to consider when you're building "your perfect practice"
- How to use integrated technology to save time and work more efficiently
- Ideas on how to structure your services to set your firm apart from others
- How to standardize & systematize your client services within six months

A Shortcut for You!

- Online, recorded video training on how to add these services to your practice (or improve what you are already doing)
- A ready-to-use Workflow System with dozens of documented procedures, checklists, templates, scripts and visual aids to use with clients that you can customize
- An online library with planning tips,, reference materials, archives and more

Huge Discounts for AICPA members!

- Choose between membership levels - with or without consulting
- Special level has been created for AICPA members only
- Program has been created so you can get your practice fully systematized within 6 months.

Discover How We Can Save You Hundreds of Hours of Time!

Fox Financial Planning Network™

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