Script for CPA to Inform Tax Clients of Financial Planning/Wealth Management Services to be Offered

After you're done discussing your clients' tax issues, casually mention to them:

"By the way, I wanted to let you know that after tax season I am adding a new higher level of service to my accounting practice that I will be offering to a small number of my existing clients. It has become very apparent to me the current economic environment we are in has made it even more important for all of us to clarify and possibly re-think our financial goals and try to do everything we can to make sure all areas of our finances are working for us in the best way possible. Do you feel that way too? (Wait for Answer.)

It is because I feel so strongly about this that I am adding this higher level of service to a select group of my clients who, I believe, can reap the most benefits from working with me in a more comprehensive manner. I am sharing this information with you (OR I have called you today) because I believe you are one of the clients that could greatly benefit from this type of relationship.

I am very excited about what I will be making available. Of course I need to get through tax season first – but once it's over, I'd like to invite you (and <spouse's name>) to come back into the office for a complimentary meeting so I can explain the details of how I propose we work together. You can then determine whether or not you feel this type of planning would be a good fit for you.

Let's set an appointment for April right now so we have it on our calendars.

OR

I'll call you in April to set up a time for us to get together."