Tax Season Appointment Checklist

- Use this checklist to optimize your client appointments this season.
- For additional help, schedule a free call with us.

◯ Step 1 | Control who is allowed to have an appointment.

Before booking a client appointment verify if the client is:

- **High Value** - Definitely needs an appointment for strategic reasons.
- **Mid Value** - Is not specifically high or low-value.
- **Low Value** - Does not need an appointment this season for any strategic reason.

◯ Step 2 | Focus the appointment time on the results of that year's filing.

Focus your appointment on these questions:

A. What happened to your income or expenses this year that lead to this specific filing result?

B. What happened with your investments or the local economy this year compared to last that affected your results?

C. What's happening in your business or your industry that affected your sales, margins, and profits that lead to these results?

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◯ **Step 3** | Clearly explain how clients can improve or maintain their results in the next filing.

Ex:	**If the client had a positive result:** • *"[Client Name] After finishing your tax report for last year, I'm so glad you ended up where we both wanted you to be. As you know, tax laws, stimulus strategies, and the economy will continue to evolve rapidly this next year and into the foreseeable future.* • *To ensure you still achieve the best possible results regardless of any upcoming changes, we need to track, analyze, & understand your key numbers. Then create a plan & execute the right action steps (in the right order) before your next filing.* • *If you would like us to be involved in this process with you, I can add you to our "Early Access List" and reach out in the spring to ensure you're in the first group that we know we'll have time to work with..." [Book a specific time to meet again or let them know to watch for a calendar invitation via email].*

Ex:	**If the client had a negative result:** • *"[Client Name] After finishing your tax report for last year, I hate that the result wasn't what we wanted it to be and we want to do everything we can to ensure this doesn't happen again. As you know, tax laws, stimulus strategies, and the economy will continue to evolve rapidly this next year and into the foreseeable future.* • *To ensure you can achieve the best possible results regardless of any upcoming changes, we need to track, analyze, & work to improve your key numbers throughout the year. Then create a plan & execute the right action steps (in the right order) before your next filing.* • *If you would like us to be involved in this process with you, I can add you to our "Early Access List" and reach out in the spring to ensure you're in the first group that we know we'll have time to work with..." [Book a specific time to meet again or let them know to watch for a calendar invitation via email].*