

Buyer's Guide

What to know to make the best decision for you.



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| What you get when you enroll

Enrolling gives you immediate access to three main components:



**SmartPath
Portal**



**SmartPath
Tools**



**SmartPath
Support**

1. SmartPath Portal

- Immediate access to the SmartPath implementation portal. Here's where you'll access your on-demand training, extensive resource library, tech tools, and marketing templates.

2. SmartPath Tools

- Your enrollment includes an exclusive license to all SmartPath guides, checklists, marketing materials, intelligent worksheets, automated reports, onboarding templates, and the ISM Advisory Method.SM All SmartPath tools work together to form pre-built pricing & strategic advisory packages you can roll-out with minimal effort.

3. SmartPath Support

- SmartPath PLUS & ACCELERATOR plans include limited, or unlimited, 1-on-1 support to provide the help and training you need for as long as your firm is enrolled (see the [Price](#) page for more details).

| When SmartPath is a good fit

SmartPath Pricing Packages have been tested & proven with firms across the country, but it may not be the right fit for everyone.

This checklist list will help you determine if SmartPath is a good fit for you.

- You believe you have value as a professional that isn't always captured in your billing.
- You know you can help clients above basic tax preparation or transactional bookkeeping, or you want to learn how.
- You find some enjoyment in analyzing client data and thinking logically to help identify strategies for better results in their business or personal finances.
- Even if you're not completely comfortable with technology, you are willing to learn new tech & workflow processes if it directly aligns with your business goals.
- You enjoy learning new things and are willing to update how you approach problems if it directly leads to better results for you, your clients, and/or your staff.
- You primarily work with business or individual clients located in the United States.
- You believe the tax & accounting industry is evolving and updated methods for pricing, marketing, and delivering client value are necessary for success now (and in the future).

| When SmartPath is not a good fit

SmartPath Pricing Packages have been tested & proven with firms across the country, but it may not be the right fit for everyone.

This checklist list will help you determine if SmartPath is not a good fit for you.

- You don't work with clients that are primarily located in the US.
- You don't believe anything in your pricing, marketing, or client delivery must change (now or in the future) for you to accomplish your business goals.
- You aren't willing to prioritize at least 1-hour per week to work on increasing your cash flow, updating your pricing, improving client education, and optimizing your value delivery processes.
- You only enjoy data entry & solitary work. You don't enjoy interacting with clients and helping them with strategy.
- You refuse to explore or adopt any new technology, workflows, or processes - even if it would directly cause better results for you, your clients and/or your staff.
- You would rather create everything in your business from scratch, instead of using pre-built components that could short-cut your results.

When is the best time to enroll?

We enroll firms all times throughout the year, depending on our availability. When you start will direct what you focus on first.



Enrollment Period #1

Directly before and during tax season, you leverage your natural communication with clients by “planting seeds” and creating an interest list of needs you will “harvest” later in the year. Because your capacity is limited during this time, large logistical changes are not made and the time you spend on training & implementation is limited.



Enrollment Period #2

When you enroll during the spring and summer, you focus on training, making necessary strategic changes to workflows & processes, and educating your First-Five clients about your new packages. The clients you educate can be existing clients naturally reaching out for help, or potential new client referrals or leads.



Enrollment Period #3

At the end of the year, you also focus on educating your First-Five clients about your packages, but you strategically analyze your roster to identify the first group of clients that can benefit most from year-end planning opportunities.

| What results to expect

Your results will be based on three primary factors:

- 1) The time you invest in the process.
- 2) How many clients you have available to educate.
- 3) How closely you follow the SmartPath Method instructions.

Below is historical data you can use to set realistic expectations based on your goals.



85% of SmartPath firms onboard their First-Five package clients within **60-days**.



Avg. price | Individual clients **\$89/month**
Avg. price | Business clients **\$399/month**



Average number of clients converted to a package in first 18 months = **30%**



60% SmartPath firms have **5 < staff**.
85% of SmartPath firms have **10 < staff**.



| SmartPath Advantages

Why do firms prefer using SmartPath versus building pricing packages on their own? Here are the Top-4 advantages.

1. Right price for every client

We've been tracking pricing data for over a decade across all 50 states. We know what prices work and what prices are unrealistic based on the accompanied value. With SmartPath packages, you never have to guess if you'll have the right price, we'll help you get it right the first time.

2. Shortcut for you

On average it takes firms over 36 months and 200+ hours to fully update their pricing on their own. Because SmartPath pricing packages are pre-built, 90% of the work is done for you and you can roll-out your packages within the first 30 days of enrollment.

3. Strategic results for clients

You have experience with planning, but you probably don't have a documented, year-round process to follow with every client. The SmartPath ISM Advisory MethodSM gives you the training to deliver strategic results for businesses & individuals. Plus, the dashboards & reports you need to track each client's progress, so you're never lost for what to do next.

4. More revenue - less work

Too many firms try to offer the wrong packages to the wrong clients. This creates a firehose of ad-hock busy work. SmartPath packages help you identify the right clients to focus your time on, so you can systematically increase your average revenue per client. This allows you to generate more income, working with fewer people so you can get your life back.

| Price

SmartPath Pricing is simple.

Our pricing consists of two elements:

1. Upfront Enrollment

Your enrollment fee provides access to the SmartPath process and covers your license to all SmartPath materials and training.

2. Monthly Access

Your monthly fee covers your continued access to the SmartPath portal & support. You can cancel your monthly access fee anytime.

Starter

DIY option.
Work at your own pace.

Enrollment

\$0



Monthly Access

\$95/month

Plus

Advisory Framework
+ Live Support =
Faster Results.

Enrollment

\$995



Monthly Access

\$195/month

Accelerator

For mature firms
ready to scale.

Enrollment

\$2,500



Monthly Access

\$395/month

| SmartPath Guarantee

We're so confident in the SmartPath Method, we guarantee it.



If your firm is accepted and completes the following requirements, we guarantee you will love your results and the freedom the SmartPath Method brings to you and your firm, or you'll receive your enrollment fee back. **No Risk. Guaranteed.**

- ✓ Attain a 100% completion rate on all on-demand study modules inside the SmartPath platform.
- ✓ Successfully complete all on-demand tests with a passing grade (if applicable to your plan).
- ✓ Follow all implementation instructions for a minimum of 90 days after your completion date of the on-demand curriculum.

| How to Enroll

Enrollment happens online and takes less than 2 minutes.

1. Contact us – SmartPath.co

Call or email us and let us know you're ready to enroll. We'll send you your enrollment link via email.

2. Enroll & make your payment

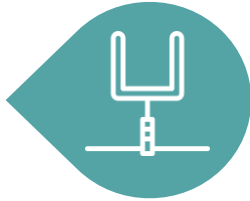
Click the enrollment link in your email, review and acknowledge the terms of service, and make your payment!

3. Immediately access your portal

Your enrollment is complete! You will gain immediate access to the SmartPath portal with all training, materials, and tools!

| What to expect after enrollment

Once you enroll, you'll follow the proven SmartPath roadmap to better results for clients & more cash flow for you.



1 | Kickoff Call

We'll schedule a call to cover everything needed to get started.



2 | Fundamentals Training

Update your pricing packages to align with the year-round value you provide.



3 | Success Mapping

We'll set goals for your firm to align your packages with the specific results you want.



4 | First-Five Clients

Educate & onboard your First-Five clients within your first 30-days for immediate results.



5 | Scale

Build out your operations, & fulfillment systems so you can help clients at scale & maximize profits.

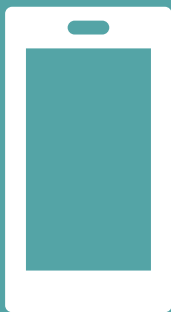


SmartPath

Rapidly Increase
Your Cash Flow

• Give Clients Help
They Want

• Simplify Your
Workday



SmartPath.co

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