

Membership Guide

See if a SmartPath Membership is right for you.



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| What you get with membership

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 membership includes an exclusive license to all SmartPath tools, guides, checklists, marketing materials, intelligent worksheets, automated reports, onboarding templates, and the ISM Advisory Method.SM All SmartPath tools work together to optimize your client engagements from Discovery to Delivery so you can simplify onboarding clients and get paid.

3. SmartPath Support

- STARTER Membership includes basic email support.
- PLUS membership includes monthly 1-on-1 implementation support
- ACCELERATOR membership includes weekly 1-on-1 support.

| When SmartPath is a good fit

SmartPath has been tested & proven with firms across the country, but membership may not be the right fit for everyone.

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

- You believe you deliver value to clients 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 enjoy analyzing client data and thinking logically to help identify strategies for better results in your client's 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 businesses 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 has been tested & proven with firms across the country, but membership 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, client onboarding, or workflow can be improved (now or in the future).
- 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 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 simply directs 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 value. 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 implementation.
- 2) How many clients you have available to educate.
- 3) How closely you follow your member training.

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



85% of members increase their revenue with at least 5 clients within **60-days**.



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



Average number of clients converted to a year-round package first 18 months = **30%**



60% members have **5 < staff**.
85% of members have **10 < staff**.



| Membership Advantages

Why do firms prefer using SmartPath tools versus building 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 pre-built service packages, you never have to guess if you'll have the right price, we'll help you get it right the first time.

3. Strategic results for clients

You may have experience with strategic planning, but you probably don't have a documented, year-round process to follow with every client. The 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 work on next.

2. Shortcut for you

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

4. More revenue - less work

Too many firms try to offer the wrong services to the wrong clients. This creates a firehose of ad-hock busy work. SmartPath tools help you identify the right clients to focus your time on, so you can systematically increase your Average Revenue Per Client (ARPC). This allows you to generate more income, with fewer clients, so you can get your life back.

| Price

Choose the membership level that works for you. Move up or down any time.

Membership pricing consists of two elements:

1. Upfront Enrollment

Your enrollment fee covers your license to all materials & training. It aligns with the amount of 1-on-1 support you need.

2. Monthly Access

Your monthly fee covers your continued access to the member portal & support. There are no long-term contracts, you can cancel 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 your results, we guarantee it.



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



Attain a 100% completion rate for all study modules inside the SmartPath member portal.



Successfully complete all tests with a passing grade (if applicable with membership).



Follow all implementation instructions for at least 90 days after completing the on-demand curriculum.

| How to Enroll

Enroll online in less than 2 minutes.

1. Go to our website – SmartPath.co

When you ready to enroll visit our website and click the “**Become a Member**” button or just visit the “**Pricing**” page.

2. Choose your membership level

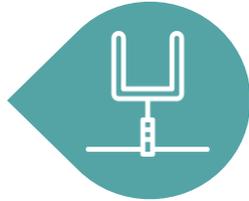
Choose whichever membership level works best for you – **Starter**, **Plus**, or **Accelerator** (you can move up or down at any time. There are no long-term contracts).

3. Immediately access your portal

Complete the enrollment steps online and you’re in! You will gain immediate access to the Member Portal with all training, materials, and tools!

| What to expect after enrollment

Once you're a member, you'll follow the proven process for better client engagements & 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

Set goals for your firm to align your packages with the specific results you want.



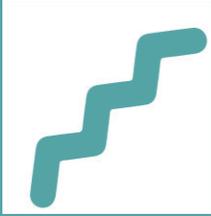
4 | First-Five Clients

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

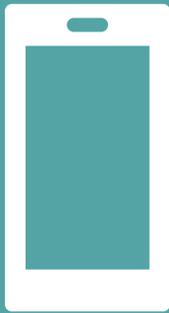
Easier Pricing
& Packages



Simplify Client
Onboarding



Create Consistent
Revenue



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