SmartPath

# Your Firm Profile

1. What do we want to improve in the next 12 months?
2. What would the total impact be?
3. What's Your biggest roadblock now?
4. When do you want to implement/invest in your progress?
5. Next Steps – Enroll and book kickoff call.

The proven Framework to **increase margins** in a small firm

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# Premium Margins Roadmap℠

1. **Identify**
   Where are you now? What's your current growth phase?
2. **Measure**
   How much revenue do you want to generate?
3. **Price**
   What you offer controls your price.
4. **Help**
   Get the right clients to raise their hands for Help.
5. **Deploy**
   Get clients your education materials.

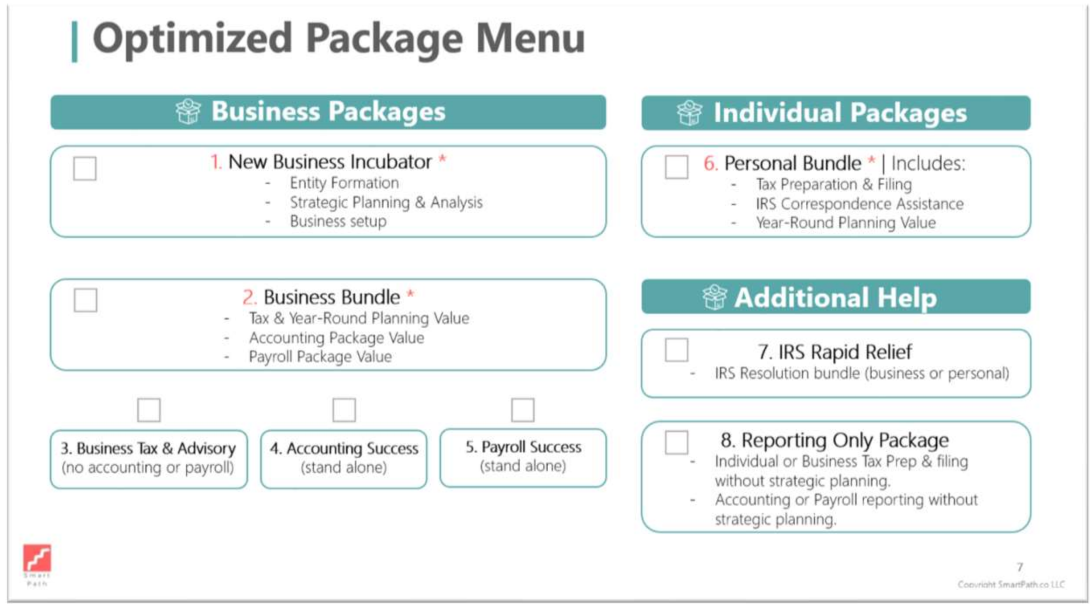
# Premium Margins Roadmap℠

**95% of the work is done for you.**

## Clients Service Packages

### Done for you

- Up to 8-Core Packages (Business & Individual)
- Custom Features & Benefits based on new & existing ideal clients.
- Optimized Package names, structure, & all details based on 12+ years of small firm data.



## Optimized Package Menu

### Business Packages

1. New Business Incubator *
   - Entity Formation
   - Strategic Planning & Analysis
   - Business setup
2. Business Bundle *
   - Tax & Year-Round Planning Value
   - Accounting Package Value
   - Payroll Package Value

3. Business Tax & Advisory (no accounting or payroll)
4. Accounting Success (stand alone)
5. Payroll Success (stand alone)

### Individual Packages

6. Personal Bundle * | Includes:
   - Tax Preparation & Filing
   - IRS Correspondence Assistance
   - Year-Round Planning Value

### Additional Help

7. IRS Rapid Relief
   - IRS Resolution bundle (business or personal)
8. Reporting Only Package
   - Individual or Business Tax Prep & filing without strategic planning.
   - Accounting or Payroll reporting without strategic planning.

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# Premium Margins Roadmap SM

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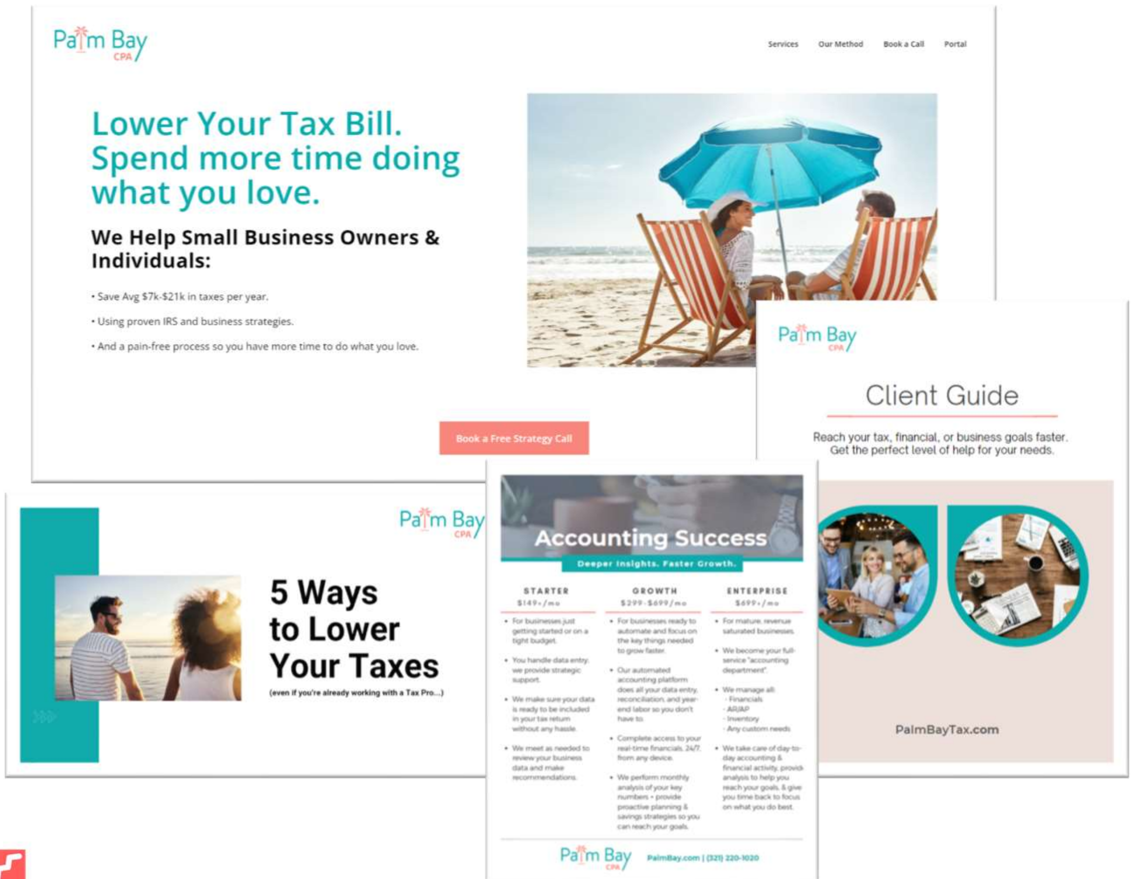



## Client Education

### Done for you

- Fully designed Digital Client Guide, Package PDF's, & Firm eBrochure.
- Fully designed and deployed website & brand optimization.
- Simple Client Referral System.

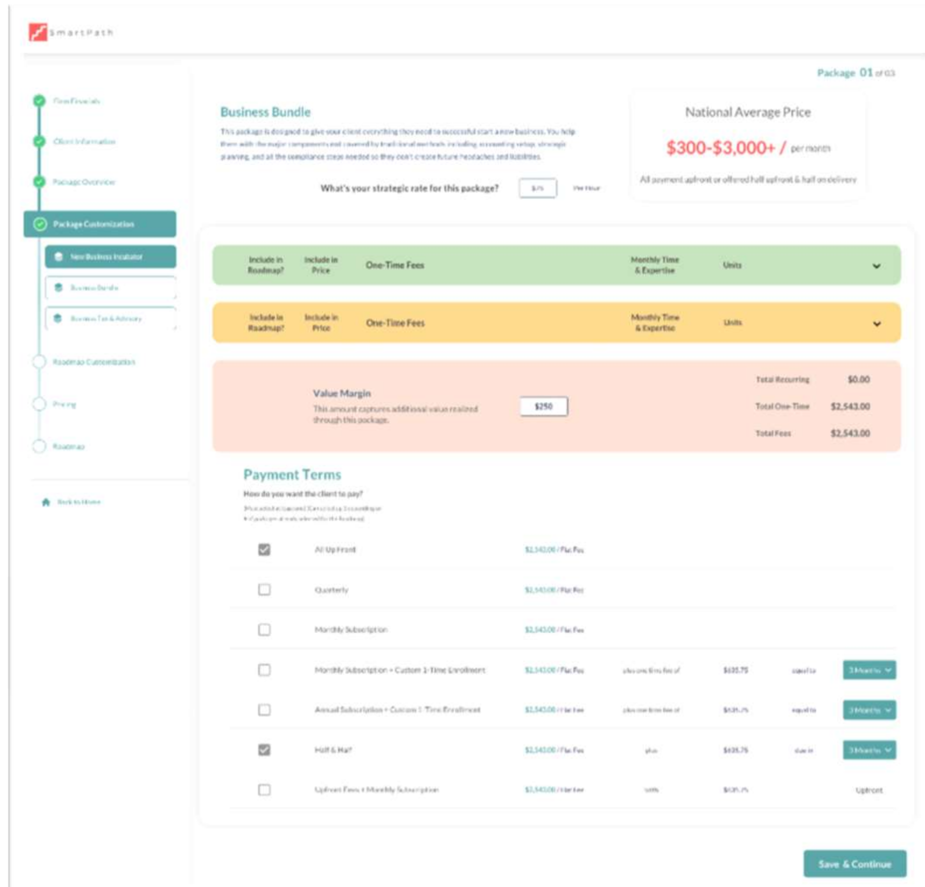
# Premium Margins Roadmap℠

**95% of the work is done for you.**

## Pricing & Proposals

### Done for you

- Customized pricing for each package based on your specific revenue goals.
- Client Proposal System so you can engage clients without selling.
- Training for all staff on the SmartPath Proposal Generator.



# Premium Margins Roadmap℠

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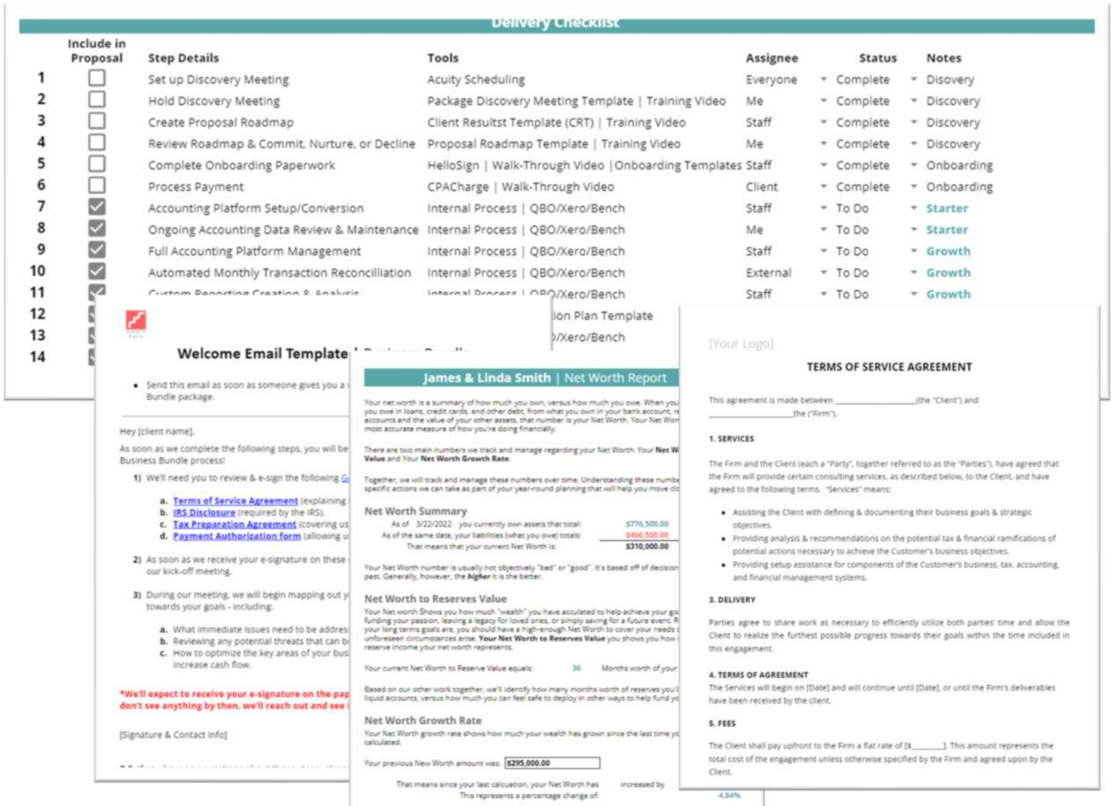


Delivery Checklist

| | Include in Proposal | Step Details | Tools | Assignee | Status | Notes |
|---|---|---|---|---|---|---|
| 1 | ☐ | Set up Discovery Meeting | Acuity Scheduling | Everyone | Complete | Disovery |
| 2 | ☐ | Hold Discovery Meeting | Package Discovery Meeting Template \| Training Video | Me | Complete | Discovery |
| 3 | ☐ | Create Proposal Roadmap | Client Resultst Template (CRT) \| Training Video | Staff | Complete | Discovery |
| 4 | ☐ | Review Roadmap & Commit, Nurture, or Decline | Proposal Roadmap Template \| Training Video | Me | Complete | Discovery |
| 5 | ☐ | Complete Onboarding Paperwork | HelloSign \| Walk-Through Video \|Onboarding Templates | Staff | Complete | Onboarding |
| 6 | ☐ | Process Payment | CPACharge \| Walk-Through Video | Client | Complete | Onboarding |
| 7 | ☑ | Accounting Platform Setup/Conversion | Internal Process \| QBO/Xero/Bench | Staff | To Do | Starter |
| 8 | ☑ | Ongoing Accounting Data Review & Maintenance | Internal Process \| QBO/Xero/Bench | Me | To Do | Starter |
| 9 | ☑ | Full Accounting Platform Management | Internal Process \| QBO/Xero/Bench | Staff | To Do | Growth |
| 10 | ☑ | Automated Monthly Transaction Reconciliation | Internal Process \| QBO/Xero/Bench | External | To Do | Growth |
| 11 | ☑ | Custom Reporting Creation & Analysis | Internal Process \| QBO/Xero/Bench | Staff | To Do | Growth |
| 12 | | | ...ion Plan Template | | | |
| 13 | | | .../Xero/Bench | | | |
| 14 | | | | | | |

Welcome Email Template

James & Linda Smith | Net Worth Report

Net Worth Summary

Net Worth to Reserves Value

Net Worth Growth Rate

[Your Logo]

TERMS OF SERVICE AGREEMENT

1. SERVICES

3. DELIVERY

4. TERMS OF AGREEMENT

5. FEES

## Strategic Delivery Systems

### Done for you

- Detailed Workflow Outline for Each Package.
- Year-Round Strategic delivery Tools & Workbooks.
- Client onboarding templates, legal agreements, & disclosure examples.

# Pricing

## Level-1

$2,495 + $95/month

**Cancel anytime.**
**No long term contracts.**

For any size firm ready to increase margins.

- Done-for-You Client Services Menu
- Done-for-You Client Education Materials
  (Client Guide, Package PDFs, Referral System, & Website Blueprint)
- Pricing & Proposals Tool Kit & Training
- Strategic Advisory Training, Tools, & Templates
- Three 1-on-1 Coaching Sessions

## Level-2

$925/month + 12% Revenue Share

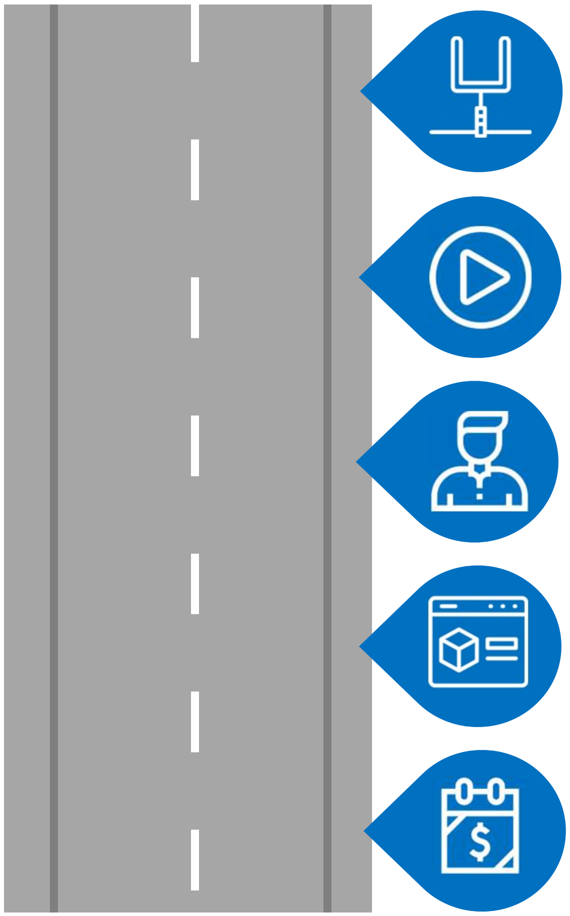
**12-Month Initial Engagement.**
**$20,000+ monthly revenue goal.**

For mature firms ready to automate & outsource growth.

- Your firm gets Strategic Advisory Certified
- We attract clients for you
  Custom Branding, Website, Marketing Materials, & **New leads Funnel**
- We help you convert clients
  Lead tracking, proposal system, custom pricing, automated onboarding
- We help you track & manage your revenue
  Automated Recurring Payments & On-going Growth Recommendations
- Year-Round Dedicated Support

# How it works

**Implement Premium Revenue Flywheel within 90 days with 1-on-1 implementation.**



**1 | Kickoff Call** (Week 1)
1-on-1 call to cover everything needed to get started.

**2 | Fundamentals Training** (Week 1)
Learn your packages, proposal process, and delivery frameworks.

**3 | First-Five Clients** (Week 2)
Increase margins with five clients within 30-days for an immediate ROI.

**4 | Website & Marketing Library Deployment** (Week 3 & 4)
We copyright, design, customize, & deploy your new website and marketing materials.

**5 | Scale** (within 90 days)
Build out your fulfillment systems so you can increase margins at scale.

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# >> Enroll at smarpath.co <<

Limited Access. First come first serve.