



## 2 – Explain Your Discovery Process:

1. “If we can identify the specific progress you want to achieve in your tax & financial picture in the next 12 months...”
2. “We’ll together pricing options and you can pick the one that matches your goals.”
3. “As soon as you choose your option and make your payment, we get to work helping you make progress + take care of any tax, accounting, payroll, or other compliance needs that you may have.”

### **Client Response**

*Example: “That sounds interesting. How can I know what my specific price would be?”*

### **Discovery Talking Points**

- “The next step is a free Discovery Session to make sure you would be a good fit for us and verify if our process would be a good fit for you.”
- “Then by the end of that meeting, we’ll have an idea of a price range that will match your needs and can give you more details.”
- “Can I email a PDF to review before our meeting so we can get your call scheduled?”

### **3 – Setup Your Discovery Meeting:**

- Send your Client Guide PDF.
- Be clear they need to review this before your call or you will need to reschedule.
- Book a date and time to meet based on their verbal commitment to review your Client Guide by that date.
- Request any needed data for your Discovery Call
  - Last two years' tax returns
  - Up-to-date P&L and Balance Sheet
  - Any active IRS correspondence
  - Etc.

#### NOTES