

Client Guide Worksheet[®]

- Use this worksheet to create your **Client Guide** [®] for educating clients about your two Service Categories.
- If you would like to have a custom Client Guide created for you, we can help. Learn more at SmartPath.co

Section 1 | Two Options for Help

Ex:	“We now have two options for working together so you can make sure every dollar you invest with us, provides you the specific help you care about most. Our Easy-Reporting option helps you quickly and easily meet your filing requirements with the IRS & State so you can have more time to do the things you enjoy doing. Our Year-Round Planning + Reporting options combine all your traditional filings with our proactive planning process so you can achieve the best possible outcomes in your business and financial life.”
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Section 2 | How to Choose the Best Option for You

Ex:	“Our Easy-Reporting option is perfect for clients that earn most of their income from a W2 job, don’t have significant real-estate or investment holdings or aren’t at a stage in your life where you want an advocate to help you plan for your future. Our Year-Round Planning + Reporting option is perfect for anyone who is self-employed, has multiple streams of income, has real estate or other investments, and wants to
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pay the absolute least amount of tax possible through proactive planning. We combine all your traditional filings with our proactive planning process so you can achieve the best possible outcomes in your business and financial life.”

Section 3 | When should you select the option you want?

Ex: We only have so many Year-Round Planning spots available, so if you’re interested in that level of service, please let us know as soon as possible. Once you upgrade to a year-round planning option, you won’t have a yearly bill anymore, you’ll invest a simple monthly fee to cover our work together. There may be setup or cleanup costs necessary to get you healthy enough to qualify for the planning process, but we will discuss those with you before your enrollment. If you wish to downgrade to a “reporting only” option, there may be a one-time fee equal to any work already completed for you that year.

Section 4 | Why work with us?

Ex: The world around us is changing and the speed of change in the future will only increase. The way many tax & accounting firms operate no longer creates the best results in this environment. We’ve updated our approach to ensure we can continue giving clients the help they want and the results they need. By selecting one of these two options, we can focus our time and attention together on achieving the exact value most important to you, aligned with a process that will be beneficial and profitable for us both.”

Section 5 | What is the investment?

Ex:	<p>Your specific pricing will be based on your specific needs but here's what to know about our pricing so you can make the best decision for you. Our reporting-only option averages about \$300-\$1,000 per year for individuals that don't own a business. For business owners, it averages between \$700-\$3,000+ depending on the complexity of your tax return. Our Year-Round Planning option averages around \$59-\$199/month for individual clients and \$199-\$999/month for businesses. Your exact investment could be more based on the complexity of your needs, the number of services, and how much planning we both agree to in the upcoming year.</p>
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Section 6 | How to get started

Ex:	<p>Step 1) Contact the office and we'll review your specific situation and verify which option may be best for your needs.</p> <p>Step 2) We'll discuss pricing and agree on an engagement that perfectly matches your goals.</p> <p>Step 3) You'll enroll, and we'll get started with pain-free reporting or start the planning process for the best possible results!</p>
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