
The ROI Revolution: How to Build a 7-Figure Advisory Firm in 4 Hours a Week

Introduction: From Side Hustle to Seven Figures in Four Hours a Week

I built a seven-figure tax firm working just four hours a week by focusing on high-value tax advisory instead of traditional compliance. I didn't just 'keep the books'—I saved clients hundreds of thousands of dollars and proved my worth with measurable ROI. You can do it too. This is a tax advisor's freedom formula for health, wealth, and better relationships.

The Problem with Traditional Accounting

The traditional accounting model is broken. Most accountants and tax advisors spend their days drowning in compliance work—completing endless forms, filing returns, and meeting regulatory deadlines. You're taught that the harder you work and the more hours you put in, the more successful you'll be. But that's a lie. The truth is, the harder you work for compliance, the more trapped you become.

I learned this lesson the hard way. I spent my early years as a CPA working long hours for someone else, with the promise of prestige and success just around the corner. But all it brought me was burnout and frustration. Eventually, I was fired. It felt like rock bottom at the time, but it was actually the beginning of something incredible.

From Fired to Freedom

When I lost my job, I was forced to rethink everything. Instead of looking for another job that would treat me the same way, I decided to bet on myself. I started my own CPA firm as a side hustle while teaching other accountants how to use emerging tech tools. During the day, I empowered others to adapt to the future of accounting. At night, I hustled to grow my own practice, preparing tax returns, answering client calls, and getting scrappy with whatever came my way.

In my first year, I was in high demand. The money rolled in quickly, and I paid off \$80,000 in student loans. On the surface, it looked like success. But behind the scenes, I was working constantly—taking on every client who knocked on my door, billing by the hour, and constantly chasing the next deadline. I was billing \$150 an hour, and even though it felt like a lot at the

time, I knew I was undercharging for the real value I provided. My time was tied directly to my income, and I was running out of hours.

The Shift: The Birth of the ROI Method

The turning point came when I realized the traditional model of compliance-first accounting simply wasn't going to get me where I wanted to be. I had one client—a private equity investor—who was attempting to prepare their own tax return, which included dozens of complex K-1s. When I reviewed the return, I found a glaring mistake: they had reported a significant capital gain sale as royalty income, overreporting their income by hundreds of thousands of dollars.

I amended their return, saving them \$150,000 in taxes. They were thrilled, but I couldn't ignore the nagging feeling that my hourly fee of a few hundred dollars just didn't match the value I'd delivered. That moment planted the seed for the **ROI Method**—a way to price based on value, not time.

Instead of billing for hours, I began charging for results. If I saved a client \$100,000 in taxes, my fee was a fair percentage of that—typically ensuring they got at least a 200% return on their investment in my services. My true value wasn't the time I spent; it was the money I saved and the strategies I implemented that changed my clients' financial futures.

The Four-Hour Week

This shift changed everything. I stopped seeing myself as just another CPA and began leading with tax advisory. I prioritized proactive strategies that saved my clients money and used technology to streamline everything else. I started charging for the outcomes I delivered—quantifiable tax savings that my clients could see and appreciate. As a result, my income grew while my workload decreased.

By the time I sold my firm in 2022, I was working just four hours a week. My firm wasn't just surviving; it was thriving. My true hourly value skyrocketed to over \$5,000 an hour because I focused on what mattered most: delivering measurable ROI for my clients.

Why This Matters for You

Most accountants and tax advisors are stuck in the old model—prioritizing compliance, billing hourly, working harder, and taking on more clients until they burn out. They leave massive opportunities on the table by ignoring the potential of tax advisory. But it doesn't have to be that way. There is a better, smarter path that leads to freedom, wealth, and work-life balance.

When you shift to tax advisory, focus on measurable client results, and leverage technology, you can build a firm that works for you. You can break free from the hourly grind and create something that not only serves your clients but also serves your life.

What You'll Learn

By the end of this book, you'll know exactly how to transition from compliance work to leading with tax advisory, deliver measurable results for your clients, and build a business that sets you free. You'll learn how to serve clients better, grow your income, and—most importantly—build a life you love. The journey starts now.

Timeline: Jackie Meyer's Journey to Success

1983

- Born in Austin, TX.

Age 15

- Started working at Marble Slab, Napa Auto Parts, and Chick-fil-A at A&M Commons.
- Moved out on my own.

2001

- Graduated high school a year early. Had Major Depressive Disorder (MDD) since childhood and was a lonely kid.
- Got into A&M's dual program to go to community college and A&M simultaneously, saving a lot of money while working full-time throughout school.

2005

- Graduated with an undergraduate degree in finance from the University of Texas at Arlington (UTA).
- Worked at a mortgage company and then a small CPA firm, where I discovered a passion for tax planning.

2009

- Completed a master's degree in taxation at Southern Methodist University (SMU).
- Worked at Deloitte, grinding through the minimum time required—I think I made it one year and 10 months.
- Married my rock, Mark.

2010

- Fired from a CPA firm and decided to start my own practice.
- Began working at CCH, teaching accountants how to use tech products like AutoFlow.

2012

- Paid off \$80,000 of student debt.
- Quit CCH to focus full-time on my tax firm, which allowed me to double my previous salary of \$70,000.

December 2013

- Welcomed my first child, my mini-me and daughter Alex.

2014

- Experienced postpartum depression, which rocked my world.
- Worked 60-80 hour weeks; the firm grossed about \$350,000 with the help of some subcontractors, but I was a micromanager.

2016

- Welcomed my second child, Gabriel, December.
- Revamped my practice to lead with tax planning.

2017

- Diagnosed with chronic fatigue after a long battle of not knowing what was wrong.
- Went one by one through the client list to pitch and convert to tax advisory packages.

2018

- Reduced my workload to a 4-hour workweek.
- Invited to coach other accountants in the Concierge CPA Program with Chuck Bauer.
- Taught 22 small-group masterminds and impacted hundreds of firms.
- TCJA tax code hit, and I was able to speak to 10,000 accountants with Intuit on the changes.

2020

- Created TaxPlanIQ while other firms struggled to go paperless during the pandemic.
- TaxPlanIQ became more valuable than my own firm within a year, growing about 70% year over year.
- Enrolled in the doctorate program in leadership at Regent University.

2022

- Sold Meyer Tax, with 56 clients, for seven figures to one of my coaching students.
- Delivered my first keynote for the New York Society of CPAs.

2024

- Stepped aside as CEO of TaxPlanIQ to pursue my mission of helping accountants and entrepreneurs thrive through speaking, authorship, and completing my doctorate.
- Wrote *The Balance Sheet of Life*.
- AICPA agreed to release my ROI Method of value pricing to its members.

2025

- World domination (and peace, of course).

Chapter 1: Starting Out Right (and Wrong)

The Crossroads of My Career

In October 2010, I found myself sitting in my car, my hands trembling on the steering wheel. I had just been fired from my job at a small CPA firm. It was a cold, gut-wrenching feeling—the culmination of years of doing everything by the book, following the “right” path, and trusting that hard work would guarantee success. In that moment, I felt humiliated, angry, and lost. It seemed like the worst day of my professional life, a door closing with no plan for what was next. Little did I know, it was actually the best thing that could have happened to me. It forced me to rethink everything. It pushed me to forge my own path.

Let’s be honest: when you’re fired, the last thing on your mind is gratitude. But the truth is, being fired was my catalyst for change. I had taken the path that most would envy. I started at Deloitte, one of the largest and most prestigious accounting firms in the world. It was supposed to be the

dream job—great salary, stability, an impressive career ladder. I learned a ton—technical skills, client management, and the complexities of the tax world. But that experience also taught me something else: I didn't want to spend my entire career being buried in spreadsheets for 70 hours a week. The work was demanding, yet unfulfilling, and I often felt like just another cog in a very large machine.

After leaving Deloitte, I thought joining a small CPA firm would be my chance to make a bigger impact. I envisioned myself having a voice, contributing more directly to the firm's success. Instead, I found myself micromanaged, undervalued, and suffocating under someone else's outdated vision of success. My creativity was stifled. My ideas were dismissed. I was exhausted, and I had lost my sense of purpose. When I got fired, it wasn't just a rejection—it was a wake-up call. It was the push I needed to finally take control of my career.

Starting the Side Hustle: Betting on Myself

I had always dreamed of building something on my own, but fear kept me tethered to jobs that weren't the right fit. Losing my job was the permission I needed to bet on myself. In October 2010, I made a bold decision: I started my own CPA firm as a side hustle. During the day, I taught other accountants how to use tech tools like AutoFlow and other CCH products, empowering them to adapt to the future of accounting. I loved that part—it was satisfying, forward-thinking work that let me help others embrace technology. But at night, I hustled tirelessly to grow my own practice. I was answering client calls, preparing tax returns, and figuring out every aspect of building a firm from scratch.

The learning curve was steep, and the workload was overwhelming. I was motivated and passionate, but I was also working myself into the ground. In that first year, I achieved results that many would have envied: I was in high demand, and I made enough money to pay off \$80,000 in student loans. I was billing \$150 an hour, and on the surface, I looked like a success story in the making. But the reality was different. I was working all the time, taking on every client who came my way, and tying my earnings directly to the hours I could put in. It didn't take long before I was burning out, even as my business was technically growing.

The Moment That Changed Everything

The turning point came with one particular client—a private equity investor with a complicated tax return involving dozens of K-1s. This client had attempted to prepare their own return, and when I reviewed it, I noticed a glaring mistake. They had reported a significant capital gain sale as royalty income, which led to hundreds of thousands of dollars in overreported income. I knew immediately I could help them.

I amended the return, and in the end, I saved the client \$150,000 in taxes. They were thrilled, and I remember feeling a surge of pride in what I had accomplished. But that night, as I sat alone at my desk, exhausted, I couldn't ignore an uncomfortable truth: for all the value I had provided—correcting a mistake that saved the client \$150,000—my fee was only a few hundred dollars. It was based on my \$150-per-hour rate. The numbers just didn't add up. I was solving

complex, valuable problems, yet my earnings were capped by an hourly rate that didn't reflect the impact I was making.

It was a critical moment of clarity. The traditional model that tied my worth to an hourly rate was fundamentally broken. I realized I had no idea what my time was truly worth. My focus had been on how many hours I worked and how much I billed per hour. But the real equation that mattered was this: my net income divided by the hours I worked. In those early days, my true hourly value was much lower than I wanted to admit. I was working myself to exhaustion, but I wasn't getting compensated for the transformative value I provided.

Flipping the Business Model: From Compliance to Advisory

It was clear that something needed to change. I had to stop thinking of myself as just another compliance-focused CPA and start leading with tax advisory. I began to prioritize proactive strategies—ways to save my clients money before tax season, not just during it. I leaned into tax planning as a value driver and began to focus my services around that.

One of the key shifts I made was embracing technology—not just to streamline compliance work, but to elevate my role as an advisor. Technology became my leverage, allowing me to serve my clients more effectively while spending less time on tedious, repetitive tasks. I began implementing advanced tax planning software like TaxPlanIQ, which allowed me to create ROI-driven strategies in minutes. This approach made it possible to deliver high-value advice efficiently, freeing me up to do the strategic work that clients truly needed.

But it wasn't just about the tech. It was about fundamentally rethinking the value I provided and how I communicated that value to clients. Instead of billing by the hour, I started charging based on the results I delivered. If I saved a client \$100,000 in taxes, my fee was \$33,000 or more—ensuring they still got a return on their investment in me that was clear and compelling. I wasn't just another cost on their balance sheet; I was a strategic partner helping them achieve meaningful financial gains.

Leading with Value: The Birth of the ROI Method

This approach led to what I now call the **ROI Method**. Instead of focusing on compliance tasks that clients saw as a necessary evil, I started leading with tax advisory. The ROI Method is simple yet powerful: charge based on the measurable results you deliver, ensuring that your clients see at least a 200% return on what they invest in your services. The ROI Method shifted the conversation with clients. No longer was I talking about billable hours or deadlines. Instead, I was talking about outcomes—how much I could save them, how I could help their business grow, and how I could deliver peace of mind.

One of my clients said it best: "You're not just my accountant anymore; you're my advisor." That shift in perception was transformative, both for my clients and for me. When your clients see you as an advisor, they value your insights, your strategies, and your partnership. They aren't questioning your fees—they're grateful for the value you provide.

My True Hourly Value: A Lesson in Worth

As I transformed my practice, my true hourly value started to climb. I stopped working with clients who only wanted compliance services. I said "no" to those who didn't see the value in tax advisory. I refined my niche, targeted high-net-worth individuals and business owners with complex needs, and began delivering measurable, strategic value.

By the time I sold my firm in 2022, my true hourly value had skyrocketed to over \$5,000 per hour. The practice I had built from scratch—working late nights and weekends, hustling constantly—had transformed into a seven-figure firm that operated efficiently, sustainably, and profitably, all while I worked just four hours a week. My business didn't just give me financial success; it gave me my life back.

Lessons Learned: The Foundation for Your Success

This chapter is about helping you avoid the mistakes I made early on. It's about setting the right foundation for a practice that's not just profitable but also sustainable—one that works for you, instead of you working for it. We'll start with some core principles: finding your niche, adopting a tech-forward mindset, and creating boundaries that protect your time and energy. These principles will set you up to build a firm that isn't just about keeping the books—it's about delivering real, measurable value that transforms your clients' financial futures.

Find Your Niche

Not every client is a good fit for tax advisory, and one of the biggest mistakes I made early on was trying to be everything to everyone. When you identify and target clients who value strategic advice over simple compliance, you build a practice on your terms. These clients are willing to pay for results, not just a checkbox. You have to find the people who see you as a partner in their growth, not just a necessary expense.

Practical Steps to Define Your Niche:

1. **Analyze Your Existing Client Base or Potential Market:**
 - Look for business owners, real estate investors, and high-net-worth individuals with complex tax situations.
 - Avoid clients who only want basic compliance services at the lowest price. They're not worth the effort when you want to build a high-value firm.
2. **Create Your Ideal Client Profile (ICP):**
 - *Revenue Threshold:* "Business owners with \$500K+ in annual revenue."
 - *Personality:* Open to strategic advice and trusts your expertise.
 - *Industry:* Specialize in sectors you're passionate about (e.g., real estate or e-commerce).
3. **Start Saying 'No' Strategically:**

- Craft a professional response for declining low-value clients:
"Thank you for considering us. Based on your needs, I recommend [referral name] for compliance services. We specialize in proactive tax advisory for [ideal client niche]."
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Adopt a Tech-Forward Mindset

Technology isn't just a tool; it's your leverage to do more in less time, allowing you to focus on what really matters. For me, embracing technology was one of the pivotal changes that allowed me to scale. It meant more than just automating tasks—it meant elevating my value proposition.

Practical Steps to Embrace Technology:

1. **Master Essential Tools:**
 - *Client Management:* Find the right practice management tech to streamline communication and workflows.
 - *Tax Planning:* Use TaxPlanIQ to create ROI-driven strategies in minutes, providing instant, measurable value.
 2. **Automate Repetitive Tasks:**
 - Examples: Scheduling, document sharing, client reminders, and tax calculations.
 - Tools: Use apps like Calendly for scheduling and secure portals for document sharing.
 3. **Position Yourself as a Tech-Savvy Advisor:**
 - Clients value efficiency. Highlight your use of cutting-edge software during onboarding:
"We leverage technology to deliver advanced tax strategies in less time, saving you money while streamlining the process."
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Create and Communicate Boundaries

Boundaries are essential for sustainability. I learned this the hard way—working all hours of the day, being available at every beck and call. You need to focus your time on high-value tasks and let go of everything else.

Practical Steps to Set Boundaries:

1. **Set Availability Expectations:**
 - Example: "I'm available Tuesdays and Thursdays for calls. Emails will be responded to within 48 hours."
 - Automate these reminders with your scheduling tool to set clear, respectful limits.
2. **Define Your Scope of Work Upfront:**

- Advisory clients receive quarterly tax planning reviews and unlimited email support—not ad hoc calls.
 - Set these expectations in your engagement letter or onboarding documents.
3. **Delegate Routine Tasks:**
- Hire a virtual assistant or admin to manage scheduling, client reminders, and follow-ups.
 - Delegate bookkeeping or lower-value services to junior staff or an external partner.
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Key Takeaways for the Reader:

- **Find Your Niche:** Focus on clients who value tax strategy over compliance.
 - **Leverage Tech:** Use tools to automate, enhance, and streamline your services.
 - **Set Boundaries:** Protect your time so you can focus on what drives the most value.
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Mini Call-to-Action:

Take 20 minutes today to:

1. Write down your ideal client profile.
 2. Research one piece of tech to implement (start with TaxPlanIQ or a client portal).
 3. Draft a boundary-setting message or policy for your clients.
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Chapter 2: Mastering Tax Advisory and the ROI Method of Value Pricing

Introduction: The Turning Point

Back in 2013, a private equity client handed me a tax return they'd prepared themselves—an intimidating labyrinth of errors and misclassifications. After diving into it, I discovered a glaring mistake: they'd reported a major capital gain as royalty income, overstating their earnings by hundreds of thousands of dollars. I corrected the return, saving them a staggering \$150,000 in taxes.

It should've felt like a triumph—and for the client, it was. But for me, it planted the seed of doubt that would grow into a total transformation. Why? Because I charged only a few hundred dollars for my time.

Back then, I was still billing by the hour, and I knew this didn't reflect the value I'd delivered. But the realization didn't fully click until 2016, when I hit my breaking point. I was pregnant with my second child, juggling a growing business and personal life, and still entrenched in a traditional compliance-driven model. My first experience with postpartum depression in 2014 had left me burned out, and I swore I wouldn't go down that road again. I couldn't afford to let my work—or my life—fall apart.

That's when I started rethinking everything: how I worked, how I charged, and most importantly, how I could build a business that worked for me, not the other way around.

From Compliance to Advisory

The first step in my transformation was letting go of the compliance-first mindset. Tax compliance—filing returns, reconciling accounts, meeting deadlines—had always been my bread and butter. But I realized that compliance alone wasn't enough to serve my clients in the way they truly needed. It was the bare minimum, not the breakthrough.

Clients didn't just want someone to prepare their taxes; they wanted someone to guide them—someone who could help them save money, build wealth, and create a better financial future. They wanted **advisory**.

Here's the key: **you can't value-price using the ROI Method without identifying tangible financial gains or tax savings**. Value pricing is rooted in measurable outcomes—tax savings, reductions in operating expenses, or improvements in cash flow. Without the insights and strategies that come from advisory work, pricing becomes subjective, leaving both you and the client guessing.

The Need for Advisory

Advisory is the foundation of everything. It's the process of diving deep into a client's financial situation, uncovering opportunities they didn't even know existed, and creating strategies that deliver real, measurable results. This isn't about running the numbers—it's about interpreting them, finding the hidden gold, and showing your clients exactly how to capitalize on it.

When you embrace advisory, you:

- **Discover Financial Gains:** Advisory helps uncover actionable tax savings, cash flow improvements, and cost reductions that compliance alone can't reveal.

- **Build Trust:** Clients see you as a strategic partner, not just a necessary expense.
 - **Deliver Tangible Value:** With advisory, your recommendations translate directly into dollars saved or earned, creating a clear ROI.
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The Shift: Introducing the ROI Method

Once I transitioned to advisory, I realized that my pricing model also had to change. Advisory is about results, not time. Charging hourly for strategic insights undervalues the true impact of the work. That's when I created the **ROI Method of Value Pricing**—a framework that aligns fees with the financial gains clients receive.

Here's the core truth: **you can't use the ROI Method without identifying measurable outcomes.** Advisory provides the foundation for those outcomes, whether they're tax savings, expense reductions, or increased cash flow. The ROI Method takes those results and translates them into a pricing structure that reflects the value delivered.

The ROI Method uses **CURB Factors**—Complexity, Urgency, Risk, and Benefits—to quantify both tangible and intangible value. This ensures that pricing isn't just about numbers but also about the peace of mind, strategic direction, and confidence you bring to your clients.

A Framework for Transformation

This chapter is about helping you take the same journey I did—from compliance to advisory and from hourly billing to value pricing. Here's what we'll cover:

1. **The Power of Advisory:** How to uncover financial gains and build deeper client relationships.
2. **The ROI Method in Action:** Step-by-step guidance on using CURB Factors to price your services based on results, not hours.
3. **Transformational Case Studies:** Real examples of how the ROI Method has delivered life-changing value to clients—and profitability to my business.

When you combine the strategic insights of advisory with the ROI Method, you create a business model that's not only lucrative but sustainable—one that puts you in control of your time, your income, and your impact. Let's dive in.

Key Takeaways for Leading with Advisory

- **Value-Driven Relationships:** Focus on the clients who value your advice, are easy to work with, and have the potential for growth.

- **Align Fees with Value:** Stop billing by the hour and start charging based on the tangible results you deliver. When clients see a clear ROI, they are eager to pay for your services.
- **Change the Conversation:** Advisory is proactive. Shift your client conversations to focus on opportunities, strategies, and outcomes rather than deadlines and forms.

Mini Call-to-Action

Take 30 minutes today to:

1. **Create Your Client List:** Rank your clients from top paying to lowest.
2. **Identify Non-PITAs:** Find the clients on your list that are non-PITAs and that you enjoy working with.
3. **Choose One Client to Focus On:** Identify one proactive strategy you can offer to this client to add more value—and price it based on delivering a 200%+ ROI.

Chapter 3: Scaling with Systems, People, and Tech

From Chaos to Calm: Why Scaling Matters

After mastering the ROI Method and leading with tax advisory, my firm began to thrive. My clients were happy, my income was growing, and I was delivering measurable value. But there was still a major obstacle: I was the linchpin. The entire practice depended on me. Every decision, every client interaction, every piece of advice—it all flowed through my desk. If I took a day off, the entire practice ground to a halt.

To achieve real freedom—the kind where you're not only earning more but also living more—I needed to scale my business in a way that didn't depend entirely on me. This meant building the right systems, hiring the right people, and using technology to streamline operations. In this chapter, I'll show you exactly how to do this, so you can grow your practice while reclaiming your time.

Step 1: Implementing Systems for Efficiency

The first step to scaling is putting systems in place. Systems are the backbone of any successful business. They turn chaos into order, they reduce errors, and they make it possible for others to

help carry the load. For me, creating systems meant documenting every process and making sure that everything I did was replicable by someone else.

Practical Action Steps:

1. Document Everything

- Start by documenting the processes you already do. This includes client onboarding, advisory sessions, tax planning strategies, billing, and even communication protocols.
- Tools like **Notion** or **Google Docs** are great for creating an internal knowledge base that everyone on your team can access.
- Example: Document how you onboard a new client—from initial consultation, through gathering documents, to setting expectations. Write down each step in detail so that anyone could follow the instructions and replicate the process.

2. Create Templates for Repetitive Tasks

- Wherever possible, create templates for repetitive tasks. This could be email templates for client communication, checklists for tax filings, or proposals for advisory services.
- Example: Create an engagement letter template for your advisory services that can be quickly customized for each client.

3. Centralize Your Client Information

- Use a client management system to centralize all client data, communications, and notes in one place. A tool like **Karbon** or **TaxDome** can help you keep everything organized and accessible. This way, when you bring on a team member, they can step in and access the information they need without having to ask you for it.

Step 2: Leveraging Technology to Scale Smarter, Not Harder

Technology was one of the key tools that allowed me to scale my practice while working less. The right tech tools can automate repetitive tasks, streamline workflows, and provide insights that help you deliver better value to your clients.

Practical Action Steps:

1. Automate Repetitive Tasks

- Automate as many administrative tasks as possible, such as scheduling meetings, sending reminders, collecting documents, and generating reports.
- Tools like **Calendly** for scheduling, **Zapier** for automating workflows, and **DocuSign** for digital signatures can save you countless hours each month.

2. Use Tax Planning Software

- Implement tax planning software like **TaxPlanIQ** to create ROI-driven tax plans quickly and efficiently. TaxPlanIQ allowed me to scale my advisory work because it streamlined the planning process and provided clear, measurable outcomes for clients—all while saving me hours of manual calculations.

- The software also helps in setting benchmarks for ROI, making it easier to price services and justify fees based on the value delivered.
- 3. **Cloud-Based Client Management**
 - Move your client data and workflows to the cloud. This not only makes your practice more flexible (so you can work from anywhere) but also makes it easier for your team to access the information they need.
 - Cloud-based platforms like **QuickBooks Online** and **Google Workspace** allow for seamless collaboration and ensure your team has real-time access to the most up-to-date client information.

Step 3: Building a Team That Aligns with Your Vision

Scaling isn't just about systems and tech; it's about people. Hiring the right team members is one of the most important investments you can make in your business. When I started, I was doing everything myself. But as I scaled, I realized that to deliver the level of service my clients deserved—and to reclaim my time—I needed a team that was aligned with my vision.

Practical Action Steps:

1. **Identify What You Should No Longer Be Doing**
 - Make a list of tasks that you're currently handling but shouldn't be. This could include administrative tasks like scheduling, basic bookkeeping, or even some of the day-to-day client communication.
 - The goal is to focus your energy on the high-value activities that only you can do—like developing new advisory strategies or managing key client relationships.
2. **Hire a Virtual Assistant or Admin First**
 - Your first hire should often be an administrative assistant or virtual assistant (VA). This person can take over scheduling, emails, document collection, and other administrative tasks that drain your time.
 - A VA can help you manage your calendar, keep your systems organized, and free up your time to focus on client strategy.
3. **Hire Strategically for Growth**
 - Once you have admin support, start hiring strategically for growth. This could mean bringing on another tax advisor to handle compliance work, or it could mean hiring a junior analyst to help with research and tax planning.
 - Hire people who align with your culture—those who are excited about delivering value to clients and aren't afraid of working with new technology. One thing I learned the hard way was that the right attitude is far more important than having the perfect experience on paper. Skills can be taught; a growth mindset can't.
4. **Delegate and Trust**
 - Delegation is key to scaling. Trust your team with responsibilities that you used to handle personally. Provide the training, documentation, and support they need, but then let them take ownership of their tasks.

- Example: Train a junior tax advisor to handle routine client meetings or quarterly reviews. Use the documented processes you've created to guide them through each step.

Scaling in Practice: The Role of Tech, People, and Systems in My Firm

The combination of systems, technology, and the right people made all the difference in my practice. I remember a moment, about two years into scaling, where I took an entire month off for a family vacation. Before implementing these strategies, the idea of stepping away for that long was unimaginable. The firm would have ground to a halt without me. But with clear systems in place, a tech stack that streamlined our processes, and a team that was aligned with my vision, the business ran smoothly without me.

One of the greatest breakthroughs was the realization that I didn't need to do everything myself for the business to succeed. My team used TaxPlanIQ to run tax plans, automated our workflows, and handled client inquiries—all without my direct involvement. And when I returned, not only had everything gone smoothly, but my clients were still getting incredible service.

Key Takeaways for Scaling Your Firm

- **Systems Save Time:** Document your processes, create templates, and make sure that your practice has an organized, repeatable way of doing things.
- **Technology Is Your Friend:** Automate repetitive tasks, streamline workflows, and use tech to add value—not just to replace manual work.
- **Invest in People:** Hire the right people, train them well, and trust them. They're your partners in growth, and the more you empower them, the more they can help you scale.

Mini Call-to-Action

Take 30 minutes today to:

1. **Document One Core Process:** Choose one key process in your practice—such as client onboarding or advisory sessions—and write out each step.
2. **Identify a Task to Automate:** Look at your to-do list and find one repetitive task that could be automated. Research tools that can help, such as scheduling apps or workflow automation tools.
3. **List Tasks to Delegate:** Write down three tasks that you currently handle but should delegate to a team member or a VA.

Scaling with Systems, People, and Tech isn't just about growing your revenue—it's about reclaiming your time, delivering exceptional value, and building a business that can thrive without you having to be involved in every little detail. This chapter equips you with the tools to build a practice that supports your life, rather than a life that's dictated by your practice.

Chapter 4: Achieving Work-Life Balance

The Myth of Hustle Culture

For most of my career, I believed in hustle culture. It was all about putting in the hours—working nights, weekends, and giving everything I had to build my firm. And I wasn't alone; many of us are taught that hard work is the only way to success. But what I realized, after years of grinding away, is that hustle isn't sustainable. Burnout isn't a badge of honor—it's a warning sign.

If you're reading this, you might be at a point in your career where you're questioning whether it's possible to grow your business without burning out. I'm here to tell you that it absolutely is. In fact, achieving work-life balance isn't just possible—it's essential for building a business that truly serves you, your clients, and your loved ones. The goal isn't to just grow your firm; it's to build a firm that gives you freedom.

The Balance Formula: Protecting Your Most Valuable Resource—Your Time

The key to work-life balance is recognizing that your most valuable resource isn't money; it's time. Time is finite, and how you choose to spend it will determine the quality of your life. For years, I was willing to give up my time for money, but I realized that I needed to rethink that equation. My goal became not just to make more money, but to make money while working less.

Here are the steps that helped me reclaim my time, improve my health, and create a better balance between work and family. I hope they'll help you do the same.

Step 1: Set Non-Negotiable Boundaries

The first step toward balance is setting boundaries that protect your time and energy. For me, the lack of boundaries was a major contributor to my burnout. I was always available—answering emails at midnight, taking calls on weekends, and letting my clients' needs dictate my schedule. It felt like I was being a great service provider, but in reality, I was sacrificing myself in the process.

Practical Action Steps:

1. **Define Your Working Hours**

- Choose specific days and times when you are available for client meetings, phone calls, or work-related tasks.
 - Example: "I work Mondays to Thursdays from 9 AM to 4 PM, and I reserve Fridays for personal development or rest."
- 2. Communicate Boundaries Clearly**
- Once you've established your working hours, communicate them to your clients. Set expectations upfront about when you are available and how you can best be reached.
 - Example: Include your availability in your onboarding documents and engagement letters: "I am available for calls on Tuesdays and Thursdays. Emails will be responded to within 48 hours." Automated email responses can also help reinforce this.
- 3. Stick to Your Boundaries**
- Setting boundaries is one thing; sticking to them is another. It can be challenging at first, especially if clients are used to having round-the-clock access to you. But by sticking to your boundaries, you'll train clients to respect them—and you'll respect yourself in the process.

Step 2: Create a Calendar That Reflects Your Values

Once I set boundaries, the next step was to create a schedule that reflected what mattered most to me. I wanted to spend more time with my family, improve my health, and have room for personal growth. This meant scheduling my work around my life, instead of the other way around.

Practical Action Steps:

- 1. Prioritize Your Health and Family Time**
 - Schedule personal priorities—like workouts, family dinners, and time with loved ones—before anything else. Treat these as non-negotiable appointments, just like you would a client meeting.
 - Example: "Every evening from 6 PM to 8 PM is family time—no exceptions." Or, "I take a walk every morning at 7 AM to set the tone for my day."
- 2. Batch Similar Activities**
 - Batching similar activities together can save you a lot of time. For example, set aside specific days for client calls, specific days for strategy sessions, and others for deep work that requires focus.
 - Example: Tuesdays and Thursdays are for client calls, while Mondays are for reviewing tax planning strategies.
- 3. Leave Room for Rest and Reflection**
 - Growth isn't just about doing—it's also about stepping back and reflecting. Leave space in your calendar for rest, personal development, or just thinking. The more room you have to think and reflect, the better decisions you'll make for your business and your life.

Step 3: Delegate and Empower Your Team

When I hired my first team members, I still found myself micromanaging their work. I thought that to maintain the quality of service, I needed to be involved in every detail. But I quickly learned that if I wanted balance, I had to trust my team and delegate effectively. The only way to reclaim my time was to empower others to take ownership.

Practical Action Steps:

1. Identify Your High-Value Activities

- Take inventory of your weekly activities and identify which are high-value—things that only you can do, like client strategy sessions—and which are low-value, like scheduling meetings or basic bookkeeping.
- Delegate all low-value tasks to your team members. Freeing yourself from the minutiae allows you to focus on what truly matters and what only you can bring to the table.

2. Hire for Growth, Not Just Relief

- When hiring, look for people who can grow with your firm. Instead of just filling a current gap, think about how new hires can take on more responsibilities and add value long-term.
- Example: If you hire a junior tax advisor, train them to handle client advisory meetings in the future, not just compliance work. It's about creating capacity in your practice for growth, not just plugging holes.

3. Empower Your Team with Autonomy

- Once you've delegated tasks, give your team members the autonomy to complete them. Set expectations, provide clear instructions, and trust them to handle their responsibilities. Over time, they'll grow more confident, and you'll find it easier to let go.
- Example: Allow a team member to handle quarterly client check-ins. Provide them with a checklist or script, but trust them to adapt it based on the client's needs.

Step 4: Use Technology to Free Up Time

Technology isn't just a tool for efficiency—it's also a tool for balance. The right technology can help you get more done in less time, allowing you to reclaim your personal time.

Practical Action Steps:

1. Automate Routine Client Touchpoints

- Use automation for routine client touchpoints, like appointment reminders, document requests, and status updates.
- Example: Use a tool like **Calendly** for automated meeting scheduling and reminders, and **TaxDome** for collecting and organizing client documents.

2. Use Project Management Software

- Platforms like **Asana** or **Trello** can help you keep track of both client work and internal projects, ensuring nothing falls through the cracks without you needing to micromanage.
 - This helps your team work independently while giving you visibility into what's being done without requiring constant check-ins.
3. **Implement Tech for Client Self-Service**
- Where possible, give clients the tools they need to help themselves. A client portal where they can upload documents, access resources, and track their own progress will reduce the number of routine emails and calls you need to respond to.
 - Example: Use **TaxPlanIQ** to provide clients with dashboards where they can see their tax strategies, track progress, and understand the ROI they're receiving.

Real Life Example: The Day I Took My Life Back

I'll never forget the day I took my first true vacation since starting my firm. I had taken trips before, but I was always glued to my phone—checking emails, taking calls, and putting out fires. This time, I took two weeks off, completely disconnected.

How did I do it? I set clear boundaries, empowered my team to take over in my absence, and trusted the systems I'd put in place. I had everything documented, automated, and assigned. My team had the autonomy they needed, and my clients knew what to expect. And the most incredible part? My practice ran smoothly without me.

That experience taught me that true work-life balance isn't a dream—it's a choice. It's the result of building systems that work without you, empowering a team that aligns with your vision, and being intentional about how you spend your time. Since that first vacation, I've taken more time off than I ever thought possible, and each time, my business has continued to thrive.

Key Takeaways for Achieving Work-Life Balance

- **Set Non-Negotiable Boundaries:** Protect your time by clearly defining your availability and sticking to it.
- **Make Time for What Matters Most:** Build your schedule around your personal priorities, not just your work obligations.
- **Empower Your Team:** Trust your team members with responsibilities that you used to handle personally, and give them the autonomy they need to grow.
- **Leverage Technology:** Use tech to automate routine tasks, improve efficiency, and free up your time for the work (and the life) that matters most.

Mini Call-to-Action

Take 30 minutes today to:

1. **Set One Clear Boundary:** Decide on one new boundary for your work hours and communicate it to your clients.
 2. **Identify a High-Value Personal Activity:** Choose one personal activity that's important to you—whether it's family time, exercise, or a hobby—and schedule it in your calendar as a non-negotiable.
 3. **Choose One Task to Delegate:** Write down one task you're currently handling that could be delegated to a team member, and take the first step to make it happen.
-

Achieving Work-Life Balance isn't just a goal—it's a necessity for building a sustainable business that serves your life, rather than one that drains you. Balance is the key to unlocking long-term growth, both in your business and in your personal fulfillment. In this chapter, I hope you find the tools and the inspiration to take back control of your time and live the life you deserve.

Chapter 5: The Exit Strategy

The End Game: Selling on Your Own Terms

For years, the idea of exiting my firm wasn't even on my radar. I was too focused on building it, serving clients, and staying on top of the endless daily tasks that came with running a business. But as my practice started to grow, and I implemented the ROI Method, I began to realize something critical: a successful business isn't one that depends on the owner. A truly successful business is one that can operate—and thrive—without you.

My goal became not just to grow my firm but to prepare it for a successful exit, whether that meant selling it to a third party or bringing on a partner to take the reins. I wanted to build something that wasn't just valuable to me, but valuable to someone else. When I eventually sold my firm in 2022 for seven figures, I knew I had achieved that goal. In this chapter, I'm going to share the key steps that helped me get there so you can do the same.

Step 1: Systematize Your Firm So It Runs Without You

If you want to sell your business, the first thing a potential buyer will look at is how dependent the firm is on you, the owner. If everything depends on you—if you're the one with all the knowledge, the relationships, and the processes—then the firm isn't worth much without you. The key is to build a firm that runs like a well-oiled machine, even when you're not there.

Practical Action Steps:

1. Document All Core Processes

- Start by documenting every major process in your firm. This includes client onboarding, tax advisory sessions, annual reviews, billing, and even marketing activities. Potential buyers need to know that they can take over without having to figure everything out from scratch.
- Tools like **Notion** or **Google Docs** are excellent for creating a firm operations manual.
- Example: Document the step-by-step process for running a quarterly tax advisory review. Include templates, scripts, and sample reports to make it easy for anyone to follow.

2. Create Checklists for Key Activities

- Checklists are a simple but powerful way to ensure consistency and quality, even if you're not involved. For each major activity—such as preparing a tax plan or onboarding a new client—create a checklist that others on your team can use to ensure every step is completed.
- Example: A new client onboarding checklist that includes collecting documents, setting expectations, and scheduling initial meetings.

3. Empower Your Team to Own Processes

- Assign ownership of key processes to your team members. This isn't just about delegation—it's about having someone who takes responsibility for each part of the business.
- Example: Have a team member own the client onboarding process. They are responsible for ensuring every new client has a seamless experience, and they follow the documented steps consistently.

Step 2: Build Recurring Revenue Streams

A firm that generates consistent, recurring revenue is far more attractive to potential buyers than one that relies on unpredictable projects or seasonal work. When I shifted my focus from compliance to advisory, one of the biggest changes I made was building recurring revenue into my practice.

Practical Action Steps:

1. Offer Advisory Packages on Subscription

- Instead of offering advisory services as one-off engagements, package them into annual subscriptions. This provides clients with ongoing support and gives your firm predictable income.
- Example: Create three tiers of tax advisory packages—basic, standard, and premium—that clients pay for on a monthly or quarterly basis. Each tier includes different levels of service, from basic tax planning to comprehensive financial strategy sessions.

2. Automate Payment Collection

- Set up automated payments for recurring services. This not only simplifies the payment process but also ensures steady cash flow, which is attractive to potential buyers.
 - Tools like **Stripe** or **GoCardless** can help set up automatic payments for clients on subscription plans.
3. **Develop Long-Term Client Contracts**
- Wherever possible, secure long-term contracts with your clients. These contracts should outline the ongoing services you'll provide, the fees, and the terms. Buyers want to see that there is a steady stream of income locked in for the future.

Step 3: Track and Showcase Your Firm's Key Metrics

If you're considering selling your firm, you need to think like a buyer. Buyers will look at your firm's metrics to determine its value. This means tracking and showcasing the key performance indicators (KPIs) that reflect the health and profitability of your firm. The better your metrics, the higher the price you can command.

Practical Action Steps:

1. **Track Financial Metrics**
 - Start with the basics: **monthly recurring revenue (MRR)**, **customer acquisition cost (CAC)**, **customer lifetime value (CLV)**, and **gross profit margin**.
 - Buyers want to see a firm that has consistent revenue, profitable margins, and clients who stay with the firm for a long time.
2. **Monitor Client Retention and Satisfaction**
 - Client retention rate is a key indicator of a firm's long-term viability. Track how many clients stay with you year after year. The higher your retention rate, the more attractive your firm will be to potential buyers.
 - Consider using a client satisfaction survey (like Net Promoter Score, NPS) to get a sense of how happy your clients are. High client satisfaction means there is a stable foundation for future growth.
3. **Showcase Efficiency Metrics**
 - Metrics like **average hours per client**, **average response time**, and **team efficiency** show potential buyers how well your systems are working.
 - Example: If you've reduced the average hours spent on a tax return from 10 hours to 4 hours thanks to your technology stack, that's a huge value driver. It shows buyers that your firm is efficient and scalable.

Step 4: Create a Compelling Growth Story

Buyers aren't just buying your firm's current revenue—they're buying its potential. This means you need to create a compelling growth story for your business. You need to demonstrate not only what your firm has accomplished but also where it can go from here.

Practical Action Steps:

1. Identify Growth Opportunities

- Highlight specific growth opportunities for your firm. This could include expanding into a new niche, offering additional services, or increasing your advisory packages.
- Example: "With the right investment, this firm could expand into the real estate sector, targeting property investors with specialized tax advisory services."

2. Showcase Your Scalability

- Make it clear how your systems, team, and technology will allow the firm to grow without a lot of additional effort.
- Example: "By leveraging TaxPlanIQ and our documented advisory processes, the firm can easily scale advisory services to more clients without a significant increase in overhead."

3. Prepare Financial Projections

- Buyers will want to see financial projections that show where the firm could be in 3 to 5 years. Create projections that highlight growth potential, such as increasing recurring revenue through subscription-based services or expanding the client base through targeted marketing efforts.

The Day It All Paid Off: My Seven-Figure Exit

I remember the day I signed the papers to sell my firm. It was a surreal moment. I thought back to all the late nights, the hustle, and the constant grind. And I thought about the changes I made—the decision to lead with advisory, to charge based on value, to scale with systems and technology. It had all led to this point.

The buyer was impressed with the firm's recurring revenue, its documented systems, and the metrics that showed a healthy, thriving practice. But what really sealed the deal was the fact that the business could run without me. The systems, the team, the technology—it was all in place, and it didn't depend on me being there every day.

The sale gave me the freedom to step back, focus on my next venture, and, most importantly, spend more time with my family. It was the culmination of years of hard work—not just to grow a firm but to grow one that was valuable in every sense of the word.

Key Takeaways for Creating a Successful Exit Strategy

- **Systematize Everything:** Document every core process and ensure your firm runs smoothly without you.
- **Build Recurring Revenue Streams:** Shift from project-based work to recurring advisory packages that provide ongoing value to clients.
- **Track Key Metrics:** Showcase the financial health of your firm by tracking metrics like recurring revenue, client retention, and operational efficiency.

- **Create a Compelling Growth Story:** Show potential buyers not just what your firm has achieved but where it's headed and how they can take it there.

Mini Call-to-Action

Take 30 minutes today to:

1. **Document One Core Process:** Choose one important process—such as onboarding or billing—and write out each step.
 2. **Identify a Recurring Revenue Opportunity:** Look at your current services and identify one that could be converted into a subscription model.
 3. **Track a Key Metric:** Start tracking one new KPI for your firm, such as monthly recurring revenue or client retention rate.
-

The Exit Strategy is all about creating a firm that's valuable not just for you but for someone else. By focusing on systems, scalability, recurring revenue, and compelling metrics, you can build a firm that's worth a premium—a firm that someone else will be eager to buy, giving you the freedom to move on to your next adventure.

Chapter 6: Crafting Your Legacy

Defining Legacy: It's More Than Just Dollars

When I first started my CPA firm, my goal was simple: make money, pay off my student loans, and make a good living for my family. And for a while, that was enough. But as the firm grew, my goals evolved. I realized that what mattered most to me wasn't just the money—I wanted to make a difference. I wanted to leave something behind that mattered, both to the clients I served and the industry I worked in.

When you build a business that's profitable, scalable, and sustainable, you're not just creating value for yourself; you're setting a new standard for what's possible in your profession. This chapter is about taking everything you've learned and achieved—about scaling, advisory work, work-life balance, and exiting—and using it to craft a legacy that goes beyond just a successful business. It's about building a life and career that has an enduring impact.

Step 1: Determine What Legacy Means to You

The first step in crafting your legacy is deciding what kind of impact you want to leave behind. Everyone's definition of legacy is different. For some, it might be about creating a firm that serves clients for generations. For others, it might be about mentoring the next generation of accountants or making a positive impact on the industry as a whole.

For me, I wanted my legacy to be about helping others find freedom. Freedom from the grind, freedom from burnout, and freedom from the limitations that often come with being an accountant stuck in the compliance mindset. I wanted to empower other CPAs and advisors to step into their true value, to realize that they could make more money while working less, and to help their clients do the same.

Practical Action Steps:

1. Define Your Legacy Goals

- Spend time reflecting on what kind of impact you want to leave behind. What matters most to you beyond revenue and profit? Is it making a difference in your clients' lives? Is it empowering other professionals? Or maybe it's creating a practice that can continue without you, serving your community for years to come.
- Write down your legacy goals. Be specific.
- Example: "I want to leave a legacy of empowering small accounting firms to embrace value-based advisory so they can grow without burning out."

2. Identify the Scope of Your Impact

- Consider who you want to impact. Is it your clients? Your team? The entire industry? This helps you focus your energy and efforts.
- Example: "I want to mentor at least five upcoming CPAs each year, helping them transition from compliance to advisory."

Step 2: Share Your Knowledge and Elevate Others

Once you know what kind of legacy you want to create, the next step is to share your knowledge and elevate others. One of the best ways to craft a lasting impact is by mentoring others and sharing what you've learned along your journey. Your successes, your failures, the lessons you've learned—these are all powerful tools that can help others grow and find success in their own right.

Practical Action Steps:

1. Start Mentoring

- Reach out to other accountants or professionals who are where you once were. Offer to mentor them and share your knowledge.
- Example: Offer monthly one-on-one sessions with young CPAs in your area or through an industry association. Help them understand the power of value-based pricing and advisory.

2. Teach What You Know

- Consider teaching workshops, webinars, or even online courses to share what you've learned. You could focus on the ROI Method, scaling a firm, work-life balance, or any other area where you have expertise.
 - Platforms like **CPA Academy** or **LinkedIn Learning** are great places to share your insights and help elevate the industry as a whole.
- 3. Write Your Story**
- Another way to leave a lasting impact is by writing. Whether it's a book, blog posts, or articles in industry publications, sharing your journey and your lessons helps create a ripple effect of positive change.
 - Example: "Write an article for an industry publication about how you used the ROI Method to create a seven-figure firm while working four hours a week. Share the practical steps so others can do it too."

Step 3: Create a Firm That Lives Beyond You

One of the most powerful legacies you can leave is a firm that continues to thrive and provide value, even after you've stepped away. This means building a business that has strong systems, a great team, and a vision that goes beyond just you. When you've built a firm that's scalable and sellable, it doesn't have to depend on you—it can serve clients, create jobs, and make an impact for years to come.

Practical Action Steps:

- 1. Develop a Succession Plan**
 - If you're planning to step away from your business, create a succession plan that ensures the firm's long-term success. This might mean training a key team member to take over your role, or it could mean bringing on a partner who shares your vision.
 - Example: Identify a senior advisor or key team member who could step into a leadership role, and start grooming them for that position.
- 2. Articulate the Vision**
 - Clearly articulate the vision for your firm. Make sure your team understands and is aligned with that vision, so they can continue to carry it forward without you.
 - Example: Write down the core mission of the firm—whether it's saving clients millions in taxes, empowering financial literacy, or building a more sustainable practice—and make sure everyone knows it.
- 3. Make the Business a Part of the Community**
 - Think about ways your firm can be a force for good in your community. This could mean offering pro bono services to local nonprofits, sponsoring community events, or creating educational programs for local schools.
 - Example: "Partner with a local nonprofit to provide free tax advisory services once a quarter." This not only creates goodwill in the community but also helps the firm become a valuable, trusted institution that clients are proud to work with.

Step 4: Empower the Profession Through Thought Leadership

One of the most meaningful ways to leave a legacy is by contributing to the advancement of your profession. Accounting and tax advisory are industries that are constantly evolving, and the work you do to elevate the profession can have a lasting impact. Whether that means innovating with new methods, pushing the boundaries of technology, or simply raising awareness about the importance of tax literacy, you have the power to shape the future.

Practical Action Steps:

1. Share Innovative Practices

- The ROI Method and the use of advanced tax planning technology like TaxPlanIQ were both innovations that set my firm apart. Sharing these practices with others not only elevates your peers but helps push the industry forward.
- Example: “Host a webinar on the ROI Method and how tax advisors can incorporate value pricing into their services to transform their practices.”

2. Engage with Industry Leaders

- Join industry groups, associations, and think tanks where you can contribute your ideas and advocate for positive change.
- Example: Participate in forums such as the **AICPA**, industry roundtables, or online communities. Share your perspective on what needs to change to make tax advisory a more respected, impactful field.

3. Raise the Bar for Advisory Services

- Your success is proof of what’s possible when you focus on advisory services, technology, and value-based pricing. Use that success as a model to challenge the status quo and encourage others to think differently.
- Example: Write an open letter to the accounting community about why the traditional compliance-focused model is outdated, and how shifting to advisory can save the profession from burnout and commoditization.

The Legacy Moment: Watching the Ripple Effect

One of the most rewarding moments of my career was seeing the ripple effect of my work. It wasn’t the seven-figure exit, and it wasn’t even the success of my own firm—it was seeing how the people I mentored, the clients I served, and the advisors I trained went on to do amazing things. I remember talking to one of my first coaching clients who had adopted the ROI Method. He told me that not only had he grown his firm, but he was also working fewer hours, spending more time with his family, and mentoring other young advisors.

That’s when I realized that my legacy wasn’t just about my firm. It was about the impact that rippled out to others, the ideas that were adopted, and the freedom that others found because of the work I had done. And that’s the kind of legacy that’s worth leaving.

Key Takeaways for Crafting Your Legacy

- **Define What Legacy Means to You:** Decide what kind of impact you want to have—whether it's on clients, your community, or the industry as a whole.
- **Share Your Knowledge:** Elevate others by mentoring, teaching, and writing. Your experience can help guide the next generation of advisors.
- **Build a Firm That Lasts:** Create a succession plan, articulate your firm's vision, and think about ways to make your business a part of your community.
- **Contribute to the Profession:** Use your success to push the industry forward. Share innovative practices, engage with industry leaders, and challenge the status quo.

Mini Call-to-Action

Take 30 minutes today to:

1. **Define Your Legacy Goal:** Write down what kind of legacy you want to leave and who you want to impact.
2. **Reach Out to Someone to Mentor:** Identify someone in your network who could benefit from your experience and offer to mentor them.
3. **Share One Lesson:** Whether it's a blog post, a LinkedIn article, or a simple social media post, share one lesson you've learned along the way that could help others.

Crafting Your Legacy is about using everything you've built to leave a positive, lasting impact—on your clients, your team, your community, and the industry. Legacy isn't about wealth or recognition; it's about making a difference. I hope this chapter inspires you to think about what you want your legacy to be and how you can start building it today.

Chapter 7: Practical Case Studies of Real Advisory Success

Case Study 1: From \$150,000 in Tax Savings to 1,400% ROI

You've already heard the story of one of my first high-net-worth clients—an executive preparing their own tax return, making costly errors, and ultimately turning to me for help. Let's revisit this example with a deeper dive into the transformation and outcomes.

The Situation:

This client was an executive with a complex financial situation, including private equity

investments that generated dozens of K-1s. When I initially reviewed his self-prepared return, I found that he had misclassified a capital gain sale as royalty income, which led to an overstatement of income by hundreds of thousands of dollars. In 2012, I charged him an hourly rate of \$150 to amend the return and correct the mistake. This simple fix saved him \$150,000 in taxes.

The Turning Point:

Initially, I was only charging based on my time. The client was thrilled, but I realized that I wasn't being fairly compensated for the value I provided. My coach, Chuck Bauer, pushed me to reconsider how I was pricing my services. He asked me a question that became the catalyst for a major shift: "Who do you love working with, and what unique value can you provide them?"

The answer was clear: I loved working with high-net-worth executives, especially those with complex tax situations. I went back to that same client and proposed a different kind of engagement—a value-based advisory package. I pitched him on \$20,000 in additional annual tax savings for a flat fee of \$10,000 per year. He immediately agreed, excited by the idea of having proactive tax planning to avoid costly errors in the future.

The Results:

Over time, the strategies I implemented saved him much more than the original \$20,000 estimate—ultimately achieving a 1,400% ROI on what he paid me. I was no longer just someone who corrected mistakes; I was his trusted advisor, actively helping him make better decisions and keep more of his money. This experience wasn't just a win for my client—it transformed how I thought about the value I delivered and how I priced it. It was the first step in transitioning to the ROI Method, and it's proof that clients see the value when you lead with results.

Key Takeaway:

When you identify where you can deliver significant financial impact and price based on the value provided rather than your time, clients are eager to invest in your services. This approach turns you into a partner in their financial success rather than just a service provider.

Case Study 2: Transforming a Real Estate Investor's Tax Strategy

The Situation:

A real estate investor came to me with multiple properties across several states. He was a high earner, but his tax strategy was non-existent. He'd been working with a compliance-focused accountant who simply filed his returns each year without any proactive planning. This client felt frustrated by his tax bill and didn't understand why he was paying so much when he'd heard about others paying far less.

The Turning Point:

The first thing I did was conduct an in-depth analysis of his past three years of tax returns. Immediately, I spotted opportunities for restructuring how he held his properties, taking advantage of cost segregation studies, and reclassifying certain expenses to improve his overall

tax position. Instead of focusing on compliance, I created a tailored tax advisory plan that would save him over \$75,000 annually.

To price this engagement, I used the ROI Method. My projected savings were \$75,000 per year, so I charged him \$25,000 annually for my advisory services—ensuring that he still saw a 200% ROI on his investment in me.

The Results:

The client ended up saving even more than we initially estimated because we found additional ways to optimize his structure. We utilized Section 1031 exchanges, strategically timed improvements, and deductions that hadn't been previously leveraged. By the end of the first year, his total savings were closer to \$90,000. The client was thrilled—not only because of the tax savings but also because he finally had a proactive plan. He felt empowered and educated, and he knew that he had a partner who was looking out for his interests.

Key Takeaway:

Leading with advisory doesn't just help clients save money; it turns their frustration into empowerment. When clients feel heard and see the tangible impact of proactive planning, they become loyal advocates and often refer others in similar situations.

Case Study 3: Saving a Family-Owned Business from a Tax Crisis

The Situation:

A local family-owned business reached out to me in a state of panic. They had received a significant tax bill due to an oversight in how they had structured compensation for family members working in the business. Their previous accountant had overlooked this issue, and it led to penalties, back taxes, and a looming IRS audit. The owners were overwhelmed and worried that this mistake could jeopardize the business they'd spent years building.

The Turning Point:

The first thing I did was assure them that there was a path forward. I reviewed their current tax filings, and we discussed the business structure, compensation arrangements, and roles of each family member. I proposed a comprehensive solution to not only resolve the current issue but also to ensure that similar mistakes didn't happen in the future.

I restructured their compensation model, ensuring that all payments were properly categorized. We implemented a formal payroll system, documented reasonable compensation, and adjusted ownership interests to better align with their operational roles. This proactive approach allowed us to minimize the penalties and significantly reduce the looming tax bill.

Instead of billing them hourly, I used the ROI Method. The immediate savings from correcting these issues were substantial—over \$60,000. I charged them \$20,000, ensuring that they were still seeing great value from our work together.

The Results:

By the time the audit was completed, the IRS accepted the amended filings without further penalties. The business owners were immensely relieved, and we developed an ongoing advisory relationship to keep everything on track. We scheduled quarterly reviews to ensure the new structure stayed compliant and allowed for continued tax optimization. In the first year alone, we saved them over \$85,000 in taxes and positioned the business for more sustainable growth.

Key Takeaway:

When you're able to turn a potentially disastrous situation into a successful outcome, you build not just a client relationship but genuine loyalty and trust. By leading with advisory and offering proactive solutions, you can turn crisis moments into opportunities for growth.

Case Study 4: Elevating an Executive's Retirement Strategy**The Situation:**

An executive nearing retirement approached me with concerns about his financial future. He had a significant amount of assets in his company's stock and a 401(k), but he wasn't sure how to minimize taxes when it came time to access those funds. He had heard about tax planning strategies from colleagues but wasn't receiving any proactive advice from his current accountant.

The Turning Point:

During our first meeting, I asked him about his long-term goals—what kind of lifestyle he envisioned, his plans for charitable giving, and his concerns about healthcare costs in retirement. This conversation allowed me to design a tax-efficient withdrawal strategy tailored to his needs.

I utilized a mix of Roth conversions during his lower-income retirement years, structured charitable donations to maximize deductions, and set up a donor-advised fund to help him support causes he cared about while reducing his taxable income. I also used asset diversification techniques to minimize the capital gains taxes on his concentrated stock position.

The total projected tax savings over the next ten years came to \$200,000. I charged him a flat \$40,000 fee for this comprehensive retirement planning package.

The Results:

The executive not only saved a significant amount on taxes, but he also felt a renewed sense of confidence about his retirement. He knew when and how to withdraw funds, had a strategy for his charitable goals, and felt that he was in control of his financial future. Instead of reacting to his taxes each year, he had a plan, and I became his trusted advisor for life.

Key Takeaway:

Advisory isn't just about saving money in the current tax year; it's about helping clients plan for

the future they want. When you position yourself as a partner in a client's long-term success, you go from being their accountant to being an integral part of their life.

Key Lessons from Real-Life Successes

- **Lead with Value:** The biggest wins came when I focused on the value I could deliver rather than the hours I spent. Clients are willing to pay for measurable results, and the ROI Method allows you to price confidently.
- **Ask the Right Questions:** The real breakthroughs often started with asking clients questions no one else had asked them—about their goals, their pain points, and what they truly valued. This is what leads to opportunities for deeper advisory relationships.
- **Proactive vs. Reactive:** These cases all had one thing in common—my approach was proactive. Instead of waiting for clients to come to me with problems, I took the lead in identifying opportunities, proposing solutions, and delivering value.
- **Transformation, Not Transactions:** Leading with advisory isn't just about completing transactions; it's about transforming how clients see their finances and their futures. It's about empowerment, confidence, and long-term growth.

Mini Call-to-Action

Take 30 minutes today to:

1. **Identify One Client:** Choose one client from your existing base that could benefit from a proactive advisory approach. What opportunities could you identify for them?
2. **Prepare a Value Proposal:** Outline a value-based advisory package that focuses on their needs, potential tax savings, and long-term goals.
3. **Pitch with Confidence:** Reach out to the client and schedule a meeting to discuss how proactive advisory could transform their financial situation, using examples from your own experience or these case studies.

Chapter 8: Navigating Challenges and Common Pitfalls

Why Transitioning Isn't Always Smooth Sailing

When I made the decision to shift from a compliance-heavy firm to an advisory-first firm focused on delivering measurable ROI, I wish I could say it was seamless. It wasn't. This kind of transformation brings new opportunities, but it also brings challenges—some that you can anticipate, and others that take you by surprise. The key to success isn't avoiding challenges altogether (that's impossible); it's learning to navigate them when they arise.

In this chapter, I want to help you understand the common pitfalls that can derail your progress and the practical steps you can take to overcome them. Whether it's dealing with clients who are stuck in the old model, learning to price confidently, or avoiding burnout, there are solutions to keep you moving forward.

Pitfall #1: Struggling to Move Away from Hourly Billing

When you've spent years—or even decades—billing by the hour, the idea of switching to value-based pricing can feel daunting. You might be worried that clients will balk at higher fees, or that you won't be able to quantify your value effectively. This is one of the most common obstacles advisors face when they start to transition to advisory-first work.

Practical Action Steps:

1. Communicate the Value Clearly

- The most important part of switching from hourly billing to value-based pricing is communicating the value clearly to your clients. Clients need to understand how your services benefit them in a way that is far more significant than just time spent.
- Example: Instead of saying, "I'll spend 10 hours reviewing your financials," say, "I'll help you identify strategies to reduce your tax bill by \$50,000 this year."

2. Use ROI as Your Foundation

- Calculate the tangible results you deliver to clients, and use this as the foundation for your pricing. If you're projecting \$100,000 in tax savings, communicate that and then charge based on a fair percentage of that value.
- Example: "My goal is to save you \$100,000 this year, and I'm confident I can achieve that. I propose a flat fee of \$30,000, giving you a projected 200% ROI."

3. Start with Your Best Clients

- Not all clients will be open to this transition at first, and that's okay. Start with your best clients—the ones who already trust you, appreciate your work, and see your value. These are the clients who are most likely to understand the benefits of moving to value pricing.
- Once you've successfully transitioned a few clients, you can use those examples to gain confidence and gradually implement value pricing across your entire base.

Common Mistake to Avoid:

Don't price based on your own discomfort or fear of rejection. Instead, anchor your fees to the value you provide. You'll always undersell yourself if you're trying to anticipate what clients will think is too expensive, instead of focusing on what you deliver.

Pitfall #2: Difficulty in Letting Go of Unprofitable Clients

Another major challenge is letting go of clients who aren't a good fit for your new advisory model. These might be clients who only want compliance services, clients who aren't willing to

pay for advisory, or clients who are difficult to work with. It can be tough—especially if you’ve built long-term relationships with them—but keeping unprofitable clients will hold you back from growing a high-value practice.

Practical Action Steps:

1. Create a Client Ranking System

- Develop a simple ranking system to assess your client base. You can rank clients based on revenue generated, willingness to engage in advisory services, and ease of working relationship. This helps you objectively identify which clients are contributing to your growth and which are not.
- Example: Rank clients A, B, C—‘A’ being high-value, easy to work with, and open to advisory; ‘C’ being clients who are low-value and take up too much of your time.

2. Segment and Communicate

- Once you’ve ranked your clients, segment them into those you want to keep, those you want to transition to advisory services, and those you need to let go. For clients you’re letting go, send a professional and courteous communication explaining that your firm’s focus has shifted and provide a referral to another accountant for compliance work.
- Example: “Our practice is transitioning to focus on providing proactive tax advisory services. Based on your current needs, I recommend [referral] to continue providing compliance services.”

3. Start with the Easy Wins

- Begin by letting go of the most difficult clients first—the ones who drain your time, cause stress, and aren’t profitable. This makes the transition easier, and you’ll quickly see the positive impact on your workload and mindset.

Common Mistake to Avoid:

Don’t be afraid to say goodbye to clients that don’t fit your new model. It might feel like you’re losing revenue in the short term, but it’s necessary for long-term growth. Holding onto clients who don’t see your value will keep you from finding clients who do.

Pitfall #3: Overworking to Justify Value

Many advisors make the mistake of overworking to justify their fees—especially after transitioning to value-based pricing. It’s easy to feel like you need to be available 24/7 or overdeliver on every single detail to prove that your services are worth it. But overworking will lead you straight to burnout, and it actually undermines the concept of value pricing.

Practical Action Steps:

1. Set Boundaries Early

- When you onboard clients, make it clear what your boundaries are in terms of availability, communication, and response times. This sets the tone for a professional relationship that respects your time.
- Example: “I am available for calls on Tuesdays and Thursdays, and I respond to emails within 48 hours. Urgent matters can be addressed through [specific process].”

2. Define What Success Looks Like

- Clearly define what success looks like for your engagement upfront. This could be a specific tax savings target, the number of advisory sessions provided, or a deliverable like a tax savings report. When clients know exactly what to expect, there’s less ambiguity, and they’re less likely to demand more of your time without reason.
- Example: “Our goal for this engagement is to save you \$75,000 through strategic tax planning. Here’s the plan for achieving that, and here’s what each step entails.”

3. Resist the Urge to Overdeliver

- It’s tempting to go above and beyond to impress clients, but this can set unrealistic expectations for what your services include. Stick to your engagement scope, and remember that the value you’re providing is in the results, not the hours worked.
- Example: “Our agreement includes quarterly advisory sessions. I’m confident these will deliver the results you’re seeking.”

Common Mistake to Avoid:

Don’t equate the value you deliver with the number of hours you work. Clients aren’t paying for your time; they’re paying for the results. Keep this in mind to prevent overworking and burning out.

Pitfall #4: Feeling Isolated During the Transition

Transitioning to an advisory-first model can feel lonely, especially if most of your peers are still stuck in compliance work or if they’re skeptical of value-based pricing. Without a support system, it’s easy to lose motivation or second-guess yourself.

Practical Action Steps:

1. Join a Mastermind or Community

- Find a community of like-minded advisors who are also transitioning to advisory or who have already made the shift successfully. A mastermind group can be a great source of support, accountability, and motivation.
- Example: Look for groups on platforms like **Facebook**, **LinkedIn**, or join industry-specific forums where value pricing and advisory services are discussed.

2. Hire a Coach

- Hiring a business coach (like I did with Chuck Bauer) can provide guidance, encouragement, and a structured approach to making the shift. A coach will push you to define your ideal clients, build your pricing model, and stay on track.
- Example: A coach can help you navigate the emotional aspects of letting go of old clients or pricing confidently, as well as hold you accountable for reaching your goals.

3. **Track Your Wins**

- Keep a record of the wins you achieve with your new advisory model. Whether it's a client that agreed to value pricing, significant tax savings, or even an easier client relationship, documenting these wins helps you see the progress and keeps you motivated.
- Example: Keep a journal or a simple list of achievements, and review them whenever you feel doubt or anxiety creeping in.

Common Mistake to Avoid:

Don't go it alone. Feeling isolated can sap your motivation and lead you back to old habits. Find peers, mentors, or a coach who can support your journey.

Pitfall #5: Not Investing in Yourself

Lastly, one of the biggest pitfalls is not investing in your own education and growth. The industry is changing rapidly, and staying up-to-date on the latest tax strategies, tech tools, and advisory techniques is crucial. Your ability to deliver value hinges on your ability to grow and evolve as an advisor.

Practical Action Steps:

1. **Schedule Time for Continuous Learning**

- Set aside dedicated time each week or month to invest in your own education. This could be attending webinars, reading books, or taking courses on advanced tax strategies or business advisory.
- Example: "Every Friday afternoon is my personal development time—I watch webinars or read up on new tax strategies."

2. **Leverage Industry Events**

- Attend industry conferences, workshops, or seminars that are specifically geared toward tax advisory, value pricing, or practice management. These events are great for learning, networking, and staying ahead of trends.
- Example: Look for events hosted by **CPA Academy** or **AICPA** that focus on tax advisory and practice growth.

3. **Invest in Certifications**

- Consider obtaining certifications that enhance your advisory skills or specialize your expertise. Certifications like **Certified Tax Planner (CTP)** or **Certified Value Growth Advisor (CVGA)** can give you a competitive edge and help you deliver more value.

- Example: “Becoming a Certified Tax Planner allowed me to gain deeper insights into advanced tax strategies, which I now leverage for my high-net-worth clients.”

Common Mistake to Avoid:

Don't stop growing. The moment you stop investing in your knowledge and skills is the moment you stop delivering the best value to your clients. Continuous learning is key to being an effective advisor and staying relevant in an ever-evolving industry.

Key Takeaways for Navigating Challenges and Common Pitfalls

- **Value Over Hours:** Price your services based on the results you deliver, not the hours you work. Communicate your value clearly and confidently.
- **Let Go to Grow:** Let go of clients that aren't a fit for your new advisory model. Your energy is better spent on clients who appreciate and pay for your value.
- **Set Boundaries and Stick to Them:** Overworking to prove your worth will only lead to burnout. Set clear boundaries with clients and deliver value within the scope of the engagement.
- **Find Support:** Surround yourself with like-minded professionals, hire a coach, or join a mastermind group. Support is crucial during any major transformation.
- **Keep Learning:** Invest in your own growth continuously—attend events, take courses, and stay on top of industry trends to maintain your value as an advisor.

Mini Call-to-Action

Take 30 minutes today to:

1. **Communicate One Boundary:** Identify one client who has been crossing your boundaries and communicate a new availability policy to them.
2. **Rank Your Clients:** Use a simple A, B, C ranking to segment your clients. Identify which clients should be let go and which could transition to advisory.
3. **Join a Community:** Find and join an online group or community for advisory accountants. Start engaging and asking questions to build support for your transition.

Chapter 9: The Future of Tax Advisory

Where We Are Now: A Shifting Landscape

The tax advisory world is changing faster than ever before. When I first started my firm, technology played a limited role—mostly in the form of software that helped with basic data entry, compliance, and tax returns. Today, however, we're in the midst of a true revolution, driven by automation, artificial intelligence (AI), cloud computing, and client expectations that are continually evolving.

The days of a compliance-focused practice being enough to keep you profitable are quickly disappearing. Compliance has been commoditized—clients see it as a cost to be minimized, rather than as a value-add service. If you want to remain competitive and thrive in the years to come, it's essential to lead with advisory, embrace technology, and position yourself as an indispensable partner in your clients' financial success.

In this chapter, I'm going to share my perspective on where the industry is heading, what you need to do to stay ahead, and how to continue providing value that clients are willing to pay a premium for.

Trend #1: Automation and the Rise of AI

Automation has already transformed the compliance side of tax work, and the next frontier is advisory itself. AI tools are getting better at analyzing financial data, spotting opportunities, and even recommending tax strategies. While this might sound intimidating, the truth is that AI is your ally. By embracing technology, you can free yourself from mundane tasks and focus on delivering the personalized advice that clients truly value.

How to Embrace This Trend:

1. Automate Compliance Completely

- To stay competitive, your compliance work should be fully automated wherever possible. Use tools that can pull data from bank feeds, categorize expenses, and even generate basic tax returns automatically.
- Example: Software like **TaxDome**, **Thomson Reuters Onvio**, or **TaxPlanIQ** can help automate the routine aspects of tax compliance, reducing the time you spend on these tasks.

2. Use AI to Enhance Advisory Services

- AI tools can help you analyze a client's tax situation, look for missed opportunities, and project the impact of various strategies. Instead of replacing advisory work, they help you provide more value in less time.
- Example: AI-based analytics platforms can analyze cash flow, forecast tax liability, and identify potential deductions or credits that weren't previously visible. This means you walk into every advisory meeting with powerful data-driven insights.

Common Pitfall:

Don't fear AI—embrace it. The firms that resist automation will find themselves outpaced by competitors who are using AI to provide more insightful, faster, and cheaper services. By

incorporating these tools, you become more efficient and effective in delivering high-value services.

Trend #2: From Transactional to Relational Client Service

As compliance becomes automated, clients will increasingly look to their tax advisors for guidance, partnership, and strategic advice. They're not just looking for someone to file their returns—they want someone who understands their goals, anticipates challenges, and helps them build wealth. The future of tax advisory is deeply relational.

How to Embrace This Trend:

1. Position Yourself as a Partner in Wealth Growth

- Move beyond tax savings to a broader wealth-building focus. Advisory shouldn't just be about reducing a client's tax bill—it should be about aligning their financial situation with their life goals, whether that's retiring early, buying a vacation home, or leaving a legacy for their children.
- Example: Offer regular advisory sessions where you not only review tax strategies but also discuss financial planning, investments, or even estate planning. Be the trusted advisor they call before making any major financial decision.

2. Deepen the Client Experience

- To become a true partner, deepen the client experience. This means more face-to-face meetings, more in-depth discussions about their goals, and customized strategies that go beyond what software can provide.
- Example: Hold an annual strategic session with clients to set goals for the coming year. Discuss not just tax strategy but other financial matters—how they're investing, what they're saving for, and any business growth goals they have. This builds deeper trust and loyalty.

Common Pitfall:

Don't treat advisory as an add-on to compliance. It's the core of your value proposition. If you're still seeing advisory as something you offer "in addition" to tax returns, you're missing the shift that's happening right now.

Trend #3: The Gig Economy and Changing Client Demands

The rise of the gig economy and the shift towards self-employment have led to an entirely new type of client. Freelancers, small business owners, and gig workers need proactive tax advice more than ever. They have complex tax situations, lack employer-sponsored benefits, and are often overwhelmed by tax compliance requirements. This presents a massive opportunity for tax advisors.

How to Embrace This Trend:

1. Develop Niche Advisory Packages for Gig Workers

- Gig workers and freelancers often face unique challenges—quarterly estimated taxes, home office deductions, and lack of retirement savings. Create specific advisory packages that target these clients and help them manage these issues effectively.
- Example: Offer an annual advisory package for freelancers that includes quarterly check-ins, estimated tax payment planning, and guidance on tax-advantaged retirement options.

2. Educate and Empower Your Clients

- Many of these clients are new to managing their own taxes and need education just as much as they need tax preparation. Position yourself as an educator—someone who helps them understand how to manage their tax responsibilities and maximize their deductions.
- Example: Run educational webinars specifically for gig workers, walking them through key concepts like estimated taxes, retirement savings, and tax deductions for self-employed individuals.

Common Pitfall:

Don't assume all clients want or need the same level of service. The rise of the gig economy means more clients are coming to you with different, unique needs. Tailor your advisory services to meet the demands of specific client groups.

Trend #4: The Value of Specialization

The future of tax advisory is specialized. Gone are the days when a generalist accountant could thrive by taking on any and every client. Specialization allows you to deeply understand your clients' industries, build targeted advisory services, and charge a premium for your expertise. It also makes your firm more marketable for future buyers who want to know you have a dedicated, loyal client base.

How to Embrace This Trend:

1. Find and Define Your Niche

- Focus on a niche where you can become the go-to advisor. Whether it's real estate investors, physicians, e-commerce businesses, or freelancers, specialization allows you to truly understand their pain points and offer tailored solutions.
- Example: Specialize in providing advisory services for real estate investors, including cost segregation studies, 1031 exchanges, and property management tax strategies.

2. Build Authority Within Your Niche

- To dominate a niche, you need to be seen as an authority. This means publishing content, speaking at niche-specific events, and connecting with key influencers in the industry.

- Example: Write articles for real estate investment websites, speak at real estate seminars, and connect with real estate agents and brokers who can refer clients to you.

Common Pitfall:

Don't be afraid to niche down. Many advisors worry that focusing on a specific group will limit their client base. In reality, specialization makes your firm more attractive to clients who want an advisor who truly understands their unique needs.

Trend #5: Real-Time Advisory with Cloud Technology

The days of annual tax planning are over. Clients expect real-time advice, and that means you need access to real-time data. Cloud accounting and integrated tax planning software are the backbone of this new approach. The future is about being proactive year-round, not reactive during tax season.

How to Embrace This Trend:

1. Implement Cloud-Based Tax Software

- Use cloud-based tax and accounting software to access client data in real-time. This way, you can identify tax planning opportunities immediately, rather than waiting for the end of the year.
- Example: Tools like **QuickBooks Online**, **Xero**, and **TaxPlanIQ** allow you to see cash flow, expenses, and tax liabilities as they happen, enabling you to provide timely advisory.

2. Offer Continuous Tax Advisory Packages

- Instead of waiting until tax season to connect with clients, offer continuous advisory packages where you review client financials on a regular basis. This allows you to identify opportunities and threats as they arise, and help clients make decisions that improve their overall financial position.
- Example: Provide a quarterly advisory package that includes financial health check-ins, cash flow analysis, and proactive tax strategy updates.

Common Pitfall:

Don't only focus on annual tax returns. If you want to keep pace with client expectations, you need to move towards continuous, proactive advisory. Clients are used to real-time updates in other areas of their lives—they expect the same from their financial services.

Preparing for What Comes Next

The future of tax advisory is bright for those who are willing to embrace change, innovate, and put value at the forefront of everything they do. The industry is moving from being primarily compliance-driven to being advisory-focused, from transactional relationships to deep partnerships, and from annual services to continuous, proactive advisory.

The most successful advisors will be the ones who:

- **Leverage Technology** to improve efficiency and deliver deeper insights.
- **Embrace Specialization** to provide niche expertise that clients can't get anywhere else.
- **Deliver Real-Time Advisory** to be truly proactive, not reactive.
- **Deepen Relationships** with clients by becoming their go-to partner for wealth growth, beyond just taxes.

The tools and strategies you've learned throughout this book aren't just about transforming your current firm—they're about preparing for a future where your role as an advisor is even more valuable. As the industry continues to evolve, your focus on ROI, value-based pricing, and proactive advisory will set you apart.

Key Takeaways for Future-Proofing Your Advisory Practice

- **Embrace AI and Automation:** Use technology to free yourself from low-value tasks and focus on high-value, relationship-driven work.
- **Become a True Partner:** Lead with advisory, understand your clients' life goals, and position yourself as an indispensable partner in their wealth-building journey.
- **Specialize to Thrive:** Find a niche and dominate it. Specialization allows you to provide more value and stand out in an increasingly crowded field.
- **Provide Real-Time Advisory:** Use cloud technology to offer continuous, proactive advisory that meets clients' needs year-round—not just during tax season.

Mini Call-to-Action

Take 30 minutes today to:

1. **Identify One Technology to Adopt:** Look at your current tech stack and identify one piece of technology that could help you automate compliance or enhance advisory.
2. **Choose a Niche to Specialize In:** Reflect on your existing client base and choose a niche that aligns with your skills and interests. Start exploring how you can deepen your expertise in that area.
3. **Map Out a Real-Time Advisory Offer:** Consider how you can move from annual tax planning to continuous advisory. Outline a simple quarterly advisory package that you could offer your clients.

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- **Deepen Relationships** with clients by becoming their go-to partner for wealth growth, beyond just taxes.

The tools and strategies you've learned throughout this book aren't just about transforming your current firm—they're about preparing for a future where your role as an advisor is even more valuable. As the industry continues to evolve, your focus on ROI, value-based pricing, and proactive advisory will set you apart.

Key Takeaways for Future-Proofing Your Advisory Practice

- **Embrace AI and Automation:** Use technology to free yourself from low-value tasks and focus on high-value, relationship-driven work.
- **Become a True Partner:** Lead with advisory, understand your clients' life goals, and position yourself as an indispensable partner in their wealth-building journey.
- **Specialize to Thrive:** Find a niche and dominate it. Specialization allows you to provide more value and stand out in an increasingly crowded field.
- **Provide Real-Time Advisory:** Use cloud technology to offer continuous, proactive advisory that meets clients' needs year-round—not just during tax season.

Mini Call-to-Action

Take 30 minutes today to:

1. **Identify One Technology to Adopt:** Look at your current tech stack and identify one piece of technology that could help you automate compliance or enhance advisory.
2. **Choose a Niche to Specialize In:** Reflect on your existing client base and choose a niche that aligns with your skills and interests. Start exploring how you can deepen your expertise in that area.
3. **Map Out a Real-Time Advisory Offer:** Consider how you can move from annual tax planning to continuous advisory. Outline a simple quarterly advisory package that you could offer your clients.

The Future of Tax Advisory is full of opportunity for those willing to innovate and lead. This chapter aims to prepare you for the changes on the horizon—empowering you to build an

advisory practice that thrives in a rapidly evolving world. Let me know if there's any particular area you'd like to dive deeper into or if we should move on to the final chapter!

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Alright, here's **Chapter 10: Action Plan for Your Own Journey**. This chapter will serve as a practical, step-by-step action plan that distills all of the lessons from the book into an easy-to-follow guide. It will help readers take what they've learned and turn it into concrete, actionable steps that will allow them to transform their own firms, create advisory-focused practices, and ultimately achieve the freedom and success they're striving for. Let's make this an empowering finale to drive real change.

Chapter 10: Action Plan for Your Own Journey

The Roadmap to Your Freedom Formula

By now, you've read about the mistakes I made, the strategies I discovered, the value of leading with advisory, the power of technology, and even the ultimate exit strategy. You've learned how to build, scale, and eventually sell a high-value tax advisory firm that works for you, instead of the other way around.

But knowledge alone isn't enough. The real magic happens when you take what you've learned and turn it into action.

This chapter is designed to be a clear, actionable roadmap that helps you take each concept and turn it into results. We'll break down the steps you need to take—one by one—so that you can create your own transformation. Whether you're just starting out or you've been running your practice for years, this action plan will help you move toward the freedom formula: more value, less stress, and a firm that can thrive without you.

Step 1: Redefine Your Client Focus

To build a practice that's advisory-first and delivers real ROI, you need the right clients—clients who value strategic advice, not just compliance.

Practical Action Steps:

1. Define Your Ideal Client Profile

- Take time to determine the types of clients you want to work with moving forward. Consider their revenue, industry, financial needs, and personality traits that align with value-focused services.
- **Action:** Write down your Ideal Client Profile. Be specific. "High-net-worth individuals in the real estate sector who value proactive tax planning and are willing to pay for results."

2. Rank Your Current Clients

- Assess your current client base using a simple A, B, C ranking. Who are your ideal clients, and who should you transition out of your practice?
- **Action:** List your clients and assign a ranking based on their fit for advisory services. Identify the ones you want to target for higher-value offerings and those you need to let go.

3. Start Saying 'No'

- It's time to start saying no to clients who aren't the right fit. Focus your energy on clients who see your value and are willing to pay for it.
- **Action:** Draft a polite response to use when letting go of clients who don't align with your new focus. This could be as simple as, "Our practice is transitioning to focus on proactive tax advisory services, and we believe [referral's name] is better suited to handle your compliance needs."

Step 2: Master the ROI Method of Pricing

Shifting away from hourly billing is crucial for scaling your value and reclaiming your time. The ROI Method ensures that you get paid for the results you deliver, not the hours you work.

Practical Action Steps:

1. Calculate the Value You Deliver

- Start with one client. Calculate the value of the tax savings or benefits you've provided. Be specific—quantify the dollar amount wherever possible.
- **Action:** Identify one client and calculate the dollar value you delivered in tax savings or financial benefits.

2. Create an ROI-Based Pricing Model

- Use that value as the basis for your pricing. Set your fees at a rate that ensures clients receive at least a 200% return on investment.
- **Action:** Create a pricing proposal based on ROI for your highest-value client. Instead of hourly billing, charge based on what you've saved them or helped them earn.

3. Pitch Your Value Proposal

- Once you've drafted a proposal based on ROI pricing, it's time to pitch it. Start with a client who already trusts you and has seen your results firsthand.
- **Action:** Set up a meeting with one of your existing clients to introduce your new advisory package, and explain how it's based on delivering real, measurable value.

Step 3: Build Systems and Automate Your Practice

Automation and documented systems are key to scaling your practice and reducing the time you spend on routine tasks. This will also make your firm more attractive for a future exit.

Practical Action Steps:

1. Document One Core Process

- Start by documenting a core process—whether it's onboarding a new client, running a tax advisory session, or preparing for year-end planning.
- **Action:** Choose one core process and document every step. Use a simple tool like Google Docs or Notion to create a playbook that anyone on your team can follow.

2. Automate Routine Tasks

- Look for opportunities to automate routine administrative tasks like scheduling, client reminders, and document management.
- **Action:** Set up an automated scheduling tool like **Calendly** and use client portals for secure document sharing. Automate at least one task this week.

3. Train and Delegate

- Empower your team to take ownership of key processes. Train them using the playbooks you've documented and let them run those parts of the business without your direct involvement.
- **Action:** Identify one team member and assign them ownership of a documented process, such as client onboarding. Provide them with clear instructions and checklists.

Step 4: Focus on Advisory First

Leading with advisory isn't just about providing services—it's about becoming a partner in your clients' financial growth. This shift will set you apart from other firms and allow you to charge premium fees.

Practical Action Steps:

1. Schedule Advisory Sessions

- Set up regular advisory sessions for your top clients. Focus on proactive tax planning, wealth-building, and optimizing their financial position.
- **Action:** Reach out to your top three clients to schedule a quarterly advisory session. Use the time to uncover their goals, challenges, and opportunities.

2. **Expand Your Advisory Offering**

- Develop a package that offers advisory services beyond tax season. This could include quarterly reviews, tax-saving strategies, or business growth consulting.
- **Action:** Outline an annual advisory package that includes specific deliverables such as quarterly meetings, tax forecasts, and strategic planning sessions.

3. **Communicate the Benefits**

- Make sure your clients understand the value of advisory work. It's about more than just taxes—it's about helping them grow their wealth, save money, and make smarter financial decisions.
- **Action:** Draft a simple message explaining the difference between compliance work and advisory. Send it to clients as part of your introduction to advisory services.

Step 5: Protect Your Time and Achieve Work-Life Balance

You can't build a scalable firm if you're working around the clock. Setting boundaries and being intentional about your time are essential for maintaining balance and achieving true freedom.

Practical Action Steps:

1. **Set Clear Boundaries with Clients**

- Define your availability for client calls, meetings, and emails. Set clear expectations to create a professional relationship that respects your time.
- **Action:** Update your email signature and onboarding materials to communicate your office hours and response times. Example: "I am available for calls on Tuesdays and Thursdays, and emails will be responded to within 48 hours."

2. **Identify High-Value Activities**

- Focus on activities that drive the most value for your business—advisory work, strategic planning, and client relationship building. Delegate everything else.
- **Action:** Write down a list of all the tasks you handle weekly. Highlight the ones that are truly high-value, and find a way to delegate or automate the rest.

3. **Create Space for Personal Life**

- Block time on your calendar for personal activities—family, exercise, hobbies. The goal isn't just to build a successful business; it's to build a life that's worth living.
- **Action:** Block out at least one afternoon this week to spend on a personal activity, and make it a recurring appointment on your calendar.

Step 6: Prepare for Your Exit

If your goal is to eventually sell your firm, you need to think ahead. The more prepared your firm is—systems in place, recurring revenue, client relationships—the higher its value.

Practical Action Steps:

1. **Create Recurring Revenue Streams**

- Package your advisory services into ongoing subscriptions that clients pay for on a monthly or quarterly basis. This creates predictable, recurring revenue.
- **Action:** Draft at least two annual advisory subscription options for clients—one at a basic level, and one premium offering that includes more comprehensive services.

2. **Track Your Metrics**

- Buyers will want to see the metrics that reflect the health of your firm: monthly recurring revenue, client retention, gross profit margin. Track these consistently.
- **Action:** Start a simple spreadsheet to track key metrics. Update it monthly and use it to identify growth opportunities and challenges.

3. **Articulate Your Growth Story**

- Be ready to articulate why your firm is valuable—not just what you’ve done, but what the firm could do in the future. Potential buyers need to see the vision for growth.
- **Action:** Draft a short statement that highlights your firm’s success and its potential for future growth. Include metrics like recurring revenue, client growth, and efficiency improvements.

Key Takeaways for Actioning Your Journey

- **Focus on Value-Driven Clients:** Let go of clients that don’t align with your new model and focus on those who see your true value.
- **Price with Confidence:** Use the ROI Method to charge for the results you deliver, not the hours you work.
- **Build Systems:** Automate routine tasks, document your processes, and delegate to your team to create scalability.
- **Lead with Advisory:** Proactively help your clients grow their wealth and achieve their goals. Become their go-to partner.
- **Protect Your Time:** Set boundaries, focus on high-value activities, and create space for your personal life.
- **Prepare for the Future:** Build recurring revenue, track key metrics, and plan for a potential exit that allows you to sell your firm for a premium.

Mini Call-to-Action

Take 60 minutes this week to:

1. **Write Down Your Ideal Client Profile:** Be specific about who you want to work with moving forward.
2. **Price One Client Using the ROI Method:** Identify the value you’ve delivered and create a value-based pricing proposal.
3. **Automate One Routine Task:** Choose one repetitive task and set up automation to streamline it.

4. **Set One New Boundary:** Define one boundary with a client that will help you protect your time and energy.

Conclusion: The Road to Freedom

Reflecting on the Journey

You've just read about my journey from the traditional grind of hourly billing to building a seven-figure advisory firm that operated on my terms. Along the way, I discovered the power of value-based pricing, the importance of delivering measurable ROI to clients, and how to build a firm that gave me my life back. But more importantly, I learned how to turn a profession that can often feel limiting and exhausting into something that brought fulfillment, freedom, and a sense of purpose.

Whether you're just starting out, feeling stuck in the compliance trap, or looking to elevate your practice to the next level, this journey is one that anyone can undertake. The strategies I've shared are not just theory—they are the real, practical steps I took to transform my own career and create a firm that worked for me, not the other way around.

The road to freedom starts with a decision: to stop letting the old way of doing things dictate your future, and to start creating a practice that aligns with your values, your ambitions, and the life you want to live.

The Freedom Formula

At the core of this transformation is a simple formula:

Freedom = Value-Based Advisory + Scalable Systems + Protected Time

This formula is the framework for everything in this book:

1. **Value-Based Advisory:** Clients are no longer looking for someone to just file their taxes. They want a partner who can guide them, help them grow, and optimize their financial lives. This means leading with advisory, charging for results, and delivering an experience that's about more than just compliance.
2. **Scalable Systems:** Freedom isn't just about making more money—it's about making more money while working less. By creating repeatable systems, automating low-value tasks, and building a capable team, you can scale without increasing your workload. This is how you transition from a firm that owns your time to a firm that runs itself.

3. **Protected Time:** Freedom is the reason most of us start our own businesses in the first place. But too often, we end up in a situation where we're working longer and harder than ever. Protecting your time—through boundaries, efficient systems, and focused, high-value work—is the key to building a practice that serves you, rather than consuming you.

You Are Ready to Begin

This isn't just a story about my success. It's a roadmap for yours.

You are ready to begin implementing these changes. Maybe you're not going to switch everything overnight, but the most important part of this journey is taking that first step. Your version of freedom might look different from mine. For some, it's working four hours a week and traveling the world. For others, it's building a thriving practice that can be passed on to the next generation. Whatever your goal is, the steps you take today will set the course for that future.

What to Do Next

1. **Take Stock of Where You Are**
 - Spend some time evaluating your practice as it stands today. Are you focusing too much on compliance work? Are you billing hourly and feeling limited by your time? Are there clients who are holding you back from creating the practice you truly want?
2. **Create Your Freedom Plan**
 - Identify one major shift you can make that will bring you closer to your ideal practice. It might be letting go of low-value clients, creating a new value-based pricing proposal for a key client, or starting the process of documenting and delegating your workflows.
3. **Commit to Continuous Growth**
 - This isn't a one-time change—it's a continuous journey. Keep learning, adapting, and improving. The tools and methods I've shared are just the beginning. As you move forward, you'll discover new ways to provide value, innovate your practice, and achieve your version of success.

The Ripple Effect

One of the most fulfilling parts of my journey has been seeing the ripple effect of my work. When I shifted to an advisory-first model, it didn't just change my life—it changed my clients' lives too. They saved money, they reduced stress, and they gained a partner who was truly invested in their success. And beyond my clients, it impacted my peers. As I shared my story, other accountants, tax advisors, and entrepreneurs began to see what was possible.

That's what I want for you. The impact you can have as a proactive advisor, as a trusted partner, goes far beyond dollars and cents. You have the power to create real change—not just for

yourself, but for your clients, your community, and even the industry as a whole. When you thrive, everyone around you thrives too.

The Vision Moving Forward

As I look to the future, I see an accounting profession that is evolving, shifting, and becoming more focused on value than ever before. Technology is changing, client expectations are changing, and the old ways of doing business are being left behind. It's an exciting time—a time when we, as advisors, have the opportunity to redefine what our work looks like, what success looks like, and what freedom looks like.

I hope this book has inspired you to take action, to redefine your own career, and to step into the kind of practice that you truly deserve. This journey isn't always easy, but I promise you—it's worth it.

You Have the Map—Now Take the Journey

Thank you for being part of this journey, for reading my story, and for committing to your own growth. You have the tools, the methods, and the step-by-step action plan to create a firm that gives you freedom and fulfillment.

Now it's time to take the first step.

The road to freedom starts here. Let's go.

Final Words of Encouragement

Remember, every successful firm owner you admire started right where you are—facing challenges, doubting themselves at times, and wondering if it was possible to make a change. But the difference between those who achieve freedom and those who stay stuck is simple: they took action, one step at a time.

If you commit to your journey, stay focused on delivering value, and believe in your ability to create change, there is no limit to what you can achieve. The freedom formula is in your hands—let's make it happen.

Peace, Love, and Literacy,
Dr. Jackie Meyer, CPA