

HOW TO BUILD A STRONGER TAX PRACTICE

The Who, What, When, Where, Why, and How
for Delivering More Client Services
and Making More Money

By Edward Mendlowitz, CPA, ABV, PFS

With Step-by-Step Procedures, Illustrative Examples, Checklists,
Worksheets, Client Handouts, Marketing Materials, Proposals, Exhibits,
and Engagement Letters

PLUS: Bonus downloadable, customizable forms and worksheets in Word
and Excel

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About the Author: Edward Mendlowitz

Partner, WithumSmith+Brown, PC. AICPA designations: PFS, ABV, CFF, CITP, CGMA. One of Accounting Today's 100 Most Influential People. Author of three tax practice management books published by the AICPA and contributor to *AICPA Management of Accounting Practice Handbook*. Winner of the Lawler Award for best article published in 2001 in Journal of Accountancy. Article titled: "Nine Ways to Make Your Firm More Exciting and Profitable." Article in January 2011 Journal of Accountancy was that year's most viewed article and was titled: "Maximizing Tax Season Efficiency." Author of 24 professional books including the bestselling *How to Review Tax Returns* (CPATrendlines.com); author of over 1000 articles and blogs, and developer and presenter of more than 250 continuing education courses and speeches. Has testified twice before House Ways and Means Committee on tax reduction, equity, and reform; admitted to practice before U.S. Tax Court; and was an adjunct MBA instructor for 11 years. Author of twice-weekly blog www.partners-network.com. Mr. Mendlowitz can be reached at emendlowitz@withum.com or 732 964-9329.

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Introduction

The 5 Reasons I Wrote This Book

Part of growing a practice is to have existing clients use more of your services. A major goal of every meeting with a client is to make sure they know every way you can help them on issues relevant to them.

These opportunities can come from anyone in the firm. Therefore, it is important for everyone in the firm to understand what the firm can do, and how they can offer it to the client. This requires careful, directed, and focused training.

The average tax return client thinks of accountants as being mainly involved in taxes. Also, an accounting firm's largest volume of clients is usually for tax return services. Therefore, a good part of the public image of your firm must come from the tax department.

The tax department must be involved in strengthening the firm's brand and name recognition, getting publicity, and introducing tax return clients to additional services. Unfortunately, many accounting firms provide very little guidance or training in this area.

There are important advantages to introducing tax return clients to additional services.

That said, there are five main reasons I wrote this handbook.

1. Tax departments provide a wide range of services, some directly flowing from a tax return, such as financial planning and asset allocation, and others indirectly such as compensation planning for executives and divorce tax and cash flow planning.
2. Methods need to be developed to cross-sell additional services to existing clients.
3. Marketing is a thorough process that includes positioning the firm, introducing the services to the clients, and getting the engagement.

4. Also necessary is training staff and partners to recognize opportunities to better serve the client, and to be able to communicate this to the client.
5. New business and growth doesn't just happen. It needs deliberate attention and management.

Much of the extra work disclosed while preparing the tax return is not time-sensitive, in that it could be done after tax season ends (which is April 15, hopefully), and even stretched into the summer months. Also, any number crunching can be assigned to summer interns, which our office has been very successful with.

Generating the work during “slow” periods helps to even out the workload, creates revenue where it wouldn't exist, and provides challenging, interesting, and satisfying services while truly helping clients.

Besides individual tax clients, business clients have great needs for additional services. For businesses that do not pay tax, planning at the business level will reduce the taxes of its owners. For tax-paying corporations, taxes saved at the entity level can be used for reinvestment by the company for further growth.

– *Edward Mendlowitz, CPA*

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Putting Tax at the Center

How to Create a Cross-Selling Culture

Sometimes we, as accountants, become aware of important life-altering issues when we prepare tax returns, but we don't want to appear as if we are trying to generate fees, so we pass on the extra telephone call. We shouldn't act like that.

Suppose you went to a dentist for a regular cleaning and you were not told that you need a periodontal consultation? How would you feel?

Or if you finally brought your car in for servicing and weren't told that all your hoses should be changed? How would you feel?

Suppose you went to an attorney for a prenuptial agreement and he or she did not tell you to revise your will and your pension designations of beneficiary? How would you feel?

Well, suppose a client came to you for their tax return preparation and you did not tell them that their investments were not on track for them to accomplish their goals, or that their life insurance was inadequate based upon their stated needs? How do you think they would feel if you did not alert them to financial issues arising from your knowledge of their situation based on their tax return and tell them you could help solve their problems?

Offering clients additional services is a good deed. The fact that you also will charge them for the advice doesn't lessen the value of the suggestions. The extra telephone call, away from the hubbub of tax season, will be a great favor for the client and should create a feeling of goodwill. Also, in some instances, you can even ask the client if they know of anyone else in their circumstances that you could be referred to. In many cases, increasing clients' awareness of services that they truly need fosters a feeling that you are more than just a tax preparer, but a trusted advisor who transcends tax preparation.

21 Money-Making Busy-Season Questions

As you see each client you should keep a list of additional services you can offer them. Also continue this list when you review each return. I prepare a list of follow-up items during a tax season on my Microsoft Outlook® task list. These items are entered as the issue or idea arises. It is simple, quick, and very satisfying. The next job will be to make the time to follow up with the client, and do your “good deed.”

Tax returns present a window into a client’s total financial affairs, and many of their other concerns also.

Here are some examples:

1. Discussing a client’s interest and dividend 1099s can lead to asking why they have certain investments or certificates of deposit (CDs).
2. An obvious reason is to tell them about tax-sheltered ways to invest such as tax-free bonds or annuities, or why corporate dividends might be something to consider.

Other issues that can be developed are:

3. The purpose for the investing and asset accumulation.
4. Is the client concerned about their children’s educational funding, or
5. Retiring, or
6. Are they saving to buy a business?

Each of these is an opportunity to follow up (after tax season) with inquiries of how you can help and to get the client to come in for an initial consultation.

Financial Planning Services: Why, When, and the Top 9

Financial Planning Services is a catch-all phrase for any services a client would need for their personal financial security and wealth management and is an outgrowth of tax services and any of the other core services performed for a client. These services can be offered to existing clients or to clients engaging you for the specific service.

With regard to tax services as the catalyst, the tax return is the roadmap of a client's financial life. A keen observer can uncover many areas clients can be assisted with.

The following are illustrations and examples of additional services that can be provided to tax clients. There are many others, but these appear to be the most common.

The AICPA issued financial planning standards that apply to AICPA members and I suggest you get a copy of the AICPA Statement on Standards in Personal Financial Planning Services No. 1 at www.aicpa.org. It is very informative and would be helpful in formulating a plan to get more involved in offering these services to your clients. The Statement also has a comprehensive engagement letter that you can adapt to your practice.

The AICPA Statement pertains to the following services:

1. Cash flow planning
2. Risk management and insurance planning
3. Retirement planning
4. Investment planning
5. Estate, gift, and wealth transfer planning
6. Elder planning
7. Charitable planning
8. Education planning
9. Tax planning

Divorce Settlement Planning: Who, Why, How

Divorce settlement planning attempts to help clients realize the reality of the financial situation and to suggest ways of settling the financial arrangements before extensive, expensive, and drawn-out negotiations, depositions, and litigation.

Who Needs Divorce Settlement Planning Services

Divorce today has become commonplace. With 50 percent of first-time marriages ending in divorce it is a good bet that many of your clients are either in the process of getting divorced or considering it. A simple inquiry can tell you where the client is in the process.

Why the Accountant Is Suited to Offer Divorce Services

The accountant is best suited to offer these services because the three financial elements of divorce fall into our expertise:

1. Allocating support payments into taxable alimony and non-taxable child support
2. Assisting in determining the value of the property settlement and the tax attributes and basis of the divided assets
3. Working out the post-divorce budgets and cash flow

We are also called upon to value operating businesses and to determine the actual income and cash flow from a business that one or both of the parties might own.

Another thing accountants do is to help the parties place the finances in perspective. This is because of our years of experience with them and their finances and the understanding that comes with that. Certain conflicts can arise because the relationship is usually with both parties, even if you have only been working with one spouse. However, this should not create a conflict when working with both spouses to try to settle it. We recognize that there will be conflicts in a litigation situation, and because of that, we usually decline to represent only one of the parties and we tell them that

they should ask their respective attorneys to recommend a suitable financial advisor.

Forensic or investigative accounting is something else that is used extensively in divorce and marital separation litigation. However, this is a specialty that requires, in addition to great adeptness in performing the work, a poised credible manner for articulating positions and findings under cross-examination in court.

9 Ways to Introduce Clients to Divorce Settlement Planning Services

Introducing the service is not that difficult. We find that people going through a divorce like to talk about it. They especially like to talk about the “excessive” money they will have to pay out, or the “paucity” of the money they will receive. Their desire to talk combined with familiarity with the accountant, and the accountant’s financial and tax prowess, make for easy introductions into the type of things accountants can help them with.

To get the ball rolling here are some questions you can ask clients about divorce and taxes.

1. Did you know there is a difference between alimony and child support in reference to taxes?
2. Did you know payments not made directly to a spouse can still be deductible alimony?
3. Did you know property settlements are not subject to gift tax?
4. Did you know you could end up owing capital gains taxes on property settlements?
5. Did you know remarriage bonuses should be part of property settlement agreements?
6. Did you know the custodial parent might be able to use head-of-household filing status?

Sample Engagement Letter and 17-Item Checklist for Eldercare Assurance Engagement

Note that this letter lists the types of services we will perform for these clients and you can use this as a checklist.

Date

Ms. Daughter
Street Address
City, State ZIP

Dear Ms. Daughter,

We are looking forward to working with you to coordinate and oversee the financial care of your mother, Mrs. Mother. We know your mother's financial care is important to you, and our service is designed to provide you with the comfort of knowing that her needs are being met. This letter highlights the steps involved in developing, implementing, and maintaining a financial care program for your mother. It also outlines, in general, our understanding of the terms and objectives of our engagement. The sufficiency of the procedures is solely your responsibility. Consequently, we make no representation regarding the sufficiency of the procedures.

Services to Be Performed

Following is a listing of some of the services we will perform on a regular basis. We will generally perform all financial and "paperwork" type of services your mother would need.

1. We will collect all her bills and ascertain their validity and accuracy.
2. We will write and mail checks for payments due by your mother in a timely manner. Generally, we will review all items due on a weekly basis and perform whatever is

Buying and Selling a Business: Who, Why, How (with 16-Item Checklist)

This service assists clients in deciding whether to buy or sell a business; determines the proper price; helps in the due diligence process; and structures the price financially in terms of cash flow and tax considerations.

Who Needs This Service

This service is for every client who wants to buy or sell a business, as well as their family or friends.

Why the Accountant Is Suited to Offer This Service

Accountants are always advising clients in this area. Even if an accountant has no experience in assisting in the price and term negotiations, the accountant can certainly help in structuring the price for best tax advantage.

This area involves a lot of tax and financial issues.

Checklist: 16 Reasons Clients Need an Accountant

The client will need help in:

1. the sales process;
2. mechanics of the sale;
3. deciding to buy or sell;
4. articulating their thoughts about why they are buying or selling;
5. determining how much they want to pay for the business, or sell the business for;
6. getting started;

Vetting New Clients (with 8-Item Checklist)

We all want additional business, but sometimes the client should be vetted to determine if it is a good fit for your firm and if there are any danger signs. Following is a checklist that could help you in making a decision to accept the client.

8 Things to Consider When Accepting a New Tax Client and Establishing a Fee Arrangement

This is a very subjective area and this listing should be used as a guide. It is not definitive and would include particular issues you are concerned with.

1. Higher income amounts create greater responsibility for the preparer. We are responsible for our errors and with higher amounts, they can cause greater damages. To some extent we are “insurers” of loss from our human errors.
2. How demanding client will be. Consider whether
 - a) client is a call stalker
 - b) wants after-hours meetings
 - c) expects unreasonable turnaround
3. How responsive client and his staff will be to information requests
4. Whether client overly mentioned fees and is looking for cut-rate fees
5. Whether client says he has not been receiving everything he should get from his present accountant, and then wants you to

12 Ways to Get New Individual Clients

Some ways are more effective than others. At one time or another I've used every method on this list, except the sign in the window, and I got some new business from each one. (I could have used the sign, but I just didn't think of it when I had the opportunity.)

1. Send an extra blank organizer to your tax clients asking them to pass it on to a friend.
2. If you use a minimum fee schedule, include that with organizer.
3. Ask each client you meet with to recommend you to a friend. (If they recommend you to an enemy you should rethink what you are doing.)
4. Ask attorneys, insurance agents, real estate brokers, business brokers, and other people you interact with professionally for referrals.
5. Mail flyers to new home owners – this is a common technique and usually yields some clients to make the mailing a break-even effort for the first year and the profit comes with the retained clients.
6. Advertise for small business clients and include in a less prominent position that you do individual tax returns. I find that people think that accountants who do businesses will do a better job on their 1040, and they expect to pay a little more for their return.
7. Advertise for QuickBooks consulting and include in a less prominent position that you do individual tax returns. Same reason as previous. You can test this and the previous ad and see if one does better than the other.
8. Hire a telemarketing service.

22 Ways to Get New Business Clients

Some of these methods duplicate the preceding checklist. When something works, keep using it.

1. Ask each client you meet with to recommend you to a friend who has a business.
2. Ask attorneys, insurance agents, real estate brokers, business brokers, and other people you interact with professionally for referrals.
3. Mail flyers to new home owners promoting that you handle home-based and small businesses.
4. Advertise for small and home-based business clients.
5. Advertise for QuickBooks and Peachtree consulting.
6. Hire a telemarketing service.
7. Hire a commission-based new business marketing company.
8. Hire a sales person.
9. If you have an accessible office or storefront, put up a sign that you do tax returns for businesses and they are welcome to come in with any questions about your service.
10. Join organizations, go to meetings, get to know people, and the business will come.
11. Look at listing of businesses that have tax liens and contact them to see if they need a “good” accountant.
12. Walk into a business, introduce yourself, and ask if you could spend 10 minutes with the owner – not a second more. Try to have a book to give them that might help them. You can give them a

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