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succeed is our goal. These are just a few of the ways we like to ensure each client that comes to us is the right fit for their needs and ours.

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On any given day, people are searching for a Tax Professional for their tax and accounting needs. What they aren't thinking about, is how important it is to find the right Tax Professional for their goals. There are multiple types of firms ranging in

size, specialty and services and it's essential that the relationship between tax pro

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To help better understand if a potential new client is the right fit, we first need to understand what services they need from us. Are they looking for:

- **An advisory partner:** A tax pro who will sit down and help plan out their clients goals long-term and help to achieve them. A proactive partner who focuses on tax strategy along with overall business strategy that helps their clients reach their business & personal goals.
- **A tax return partner:** A tax pro who will solely focus on completing tax returns each year. While this expert may have deep and extremely beneficial tax knowledge, they do not provide additional advice as far as overall business financials.
- **Middle- ground partner:** A tax pro who will file their clients tax returns and also be available for some quick advice. This is not as extensive as an advisory partner; this partner is focused on small increments of help, rather than a full long-term goal setting offering.

## Planning is the First Step

After identifying the type of support the potential client is looking for, our first official step to bring the client on board is always to conduct a planning meeting. By doing so, we understand what the client wants out of a tax pro as well as important logistical information — like how they do their taxes and preferred meeting cadences if we move forward. Truly understanding where the potential client wants to go with their finances can help build a better relationship and be a mutually beneficial meeting.

## Set Goals to Achieve Success

After the planning meeting, we set clear goals with action items for our clients, and then internally, so that we can provide the best services possible to help them succeed. With that in mind, we make sure everything at our firm is goal-based. This

not only helps as we support our clients in reaching their business objectives, but

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