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year-over-year. A lot of firms already offer one-on-one planning advice to clients ...

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**By Jasen Stine and Nadia Rodriguez.**

The path to advisory services is a journey that is likely a multi-year adventure for firms to test out the process with their clients and continue building and scaling year-over-year. A lot of firms already offer one-off planning advice to clients without charging them. The endgame for advisory services is getting to a point with clients where they understand your ongoing guidance will help them achieve their goals and add so much more value than just a tax return or a one-off piece of advice.

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recommendations, and more. From there, it's time to hand-pick a few trusted clients to test out the new system to get all of the kinks out and address any questions they may have. Once you are confident in the way you are offering advisory services, you can start rolling it out to the rest of your clientele. After you start seeing results, make sure you communicate that with your clients so they can see the transition from vision to reality.

### Create an Advisory Workflow

Technology is an amazing tool for accountants, and when you are switching to advisory services it can be extremely helpful to automate administrative tasks to spend more time advising clients. Start testing out products for bookkeeping and reporting, client communication, e-signing, and more to get an understanding of what works best for your firm. With less time devoted to the day-to-day tasks, your clients will be able to see more significant results from the advice you are able to provide and the goals they are mapping toward.

Adopting a new technology doesn't happen overnight. Remember it is a process to find the right system that works for you and your clients. Don't rush into it, take your time, and find the perfect balance of automation for you.

### Deliver Bundled Services

To help mitigate any confusion, bracket out different service packages for your clients to choose from. This will help set boundaries and allow clients to pick what lane they are most comfortable in. Often, leading firms provide three bundles for clients to achieve their advisory goals – one for the client with the most basic needs, one for the bulk of your client base, and one for the clients with the highest needs and planning asks. This will also help clients visualize the services they want and can help them achieve their goals.

With these bundles, tax professionals are now able to be compensated for the advice

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investing in financial advice is worth it. At Intuit, we also created a free helpful tool: [The Path to Advisory](#) that you can reference at any time to read first-hand advice and actionable steps to take from firms who have already transitioned.

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