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more proactive approach to the services we offer?

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*By Adrienne Barrett.*

When someone hires a personal trainer because they want to get in shape, they don't think twice about paying them for their services. After all, there's nothing more valuable than health. So why isn't it the same for tax professionals, who look after a client's financial health?

This is the challenge tax professionals face when it comes to building strong advisory

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and a good CPA.”

That’s because, as a small business owner for the last four decades, he understands that a good tax professional is so much more than the source of a once-annual tax return. They are problem-solvers and confidants who clients trust to have honest conversations, make the best decisions with their money, and provide the most invaluable feeling of all: peace of mind.

Being crystal clear about these offerings is crucial for the long-term success of client relationships, and this is especially true when it comes to advisory services. Not every client will initially understand a fee-based structure or a line item bill for advisory offerings, so it’s imperative to sit down and define your role and the life-long resources you are bringing to the table.

Selling your services can be a challenging step for new tax professionals and career veterans alike, but starting this dialogue with your clients early will build the foundation for your role as an advisor who is always a phone call, text, or email away.

## 2. Beat the ‘Awkward Tax Pro’ Stigma

There’s no shortage of well known jokes about professions and the people who pursue them. Tax professionals aren’t exempt, and whether you’re in the industry or not, you’ve likely heard the stereotype of social awkwardness (queue the outdated pocket protectors).

Of course, this isn’t the case. Like any industry, accounting is full of an incredibly diverse range of people with different backgrounds, interests, and personality types. Still, it’s important to acknowledge the impact these preconceived notions may have, and be sure to put your best foot forward when meeting a potential client.

If someone is new to advisory services, it's also important not to let doubt or fear

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### 3. Stay Open, Flexible, and Curious

To build the best relationships, tax professionals need to know who they are, how they want to work, and what clients fit their personal interests. Achieving this takes an openness to change and flexibility to follow new paths.

As more firms go digital and clients turn toward Internet-based services, tax professionals need to lean into these trends and invest in the future of cloud, advisory services, and assurance. This applies to even the most old-school CPAs, who can learn from this younger generation of tech-first tax professionals while teaching them the fundamentals.

More people are also moving into accounting, so firms dealing with staffing shortages should be open to hiring professionals with non-traditional backgrounds. Doing so can lead to finding the best fit for their business that they may not have found otherwise.

At the end of the day, it's important to remember that joining the tax profession comes from a love of solving problems. The best way to do that is through cultivating and maintaining strong relationships with everyone from industry peers to clients, new and old.

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*Adrienne Barrett is a client success leader at Intuit. She also works with a fee-based personal trainer and happily pays her CPA for advisory services.*

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