

Checkpoint® Marketing for Firms

2015-2016

TAX PRACTICE MARKETING GUIDE

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IF YOU HAVE ANY QUESTIONS ABOUT WAYS TO USE YOUR TAX GUIDE OR OUR OTHER CONTENT MARKETING TOOLS TO BUILD YOUR TAX PRACTICE, PLEASE CALL US AT 800-227-0498.



INTRODUCTION

Informing clients and other taxpayers about ways to save tax and achieve their financial goals is a proven way to position your firm as a thought leader and encourage contact that builds client relationships. This is exactly what the Checkpoint® *Tax Planning Guide* is designed to do.

To benefit fully from this versatile content marketing, business development and client retention tool, you need to share the guide in a way that maximizes readership, as well as to leverage it with other activities, such as seminars and follow-up calls. To help you do this, we've put together this *Tax Practice Marketing Guide*. In it we:

- Present ideas for increasing the impact of each guide format
- Explain why to use both print and electronic formats
- Suggest other tools for marketing your tax practice
- Provide a sample email, letter and social media post to present your guide

Our goal here is to help you increase awareness of your tax services and encourage readers to contact you for assistance in selecting and implementing appropriate tax planning strategies.

We hope you find this information helpful in strengthening your tax practice. If you have any questions about the ideas we present here or other marketing and client communication matters, please call your Account Coordinator at 800-227-0498.

We thank you for choosing our tax planning guide and wish you much success in using it to nurture clients, generate leads and grow your tax business.



GET THE MOST FROM YOUR *TAX PLANNING GUIDE*

Here are suggestions for maximizing the effectiveness of your *Tax Planning Guide* in increasing awareness of your tax services, generating new business leads and building stronger — and more profitable — client relationships.

ONLINE TAX GUIDE

Adding the online *WebTaxGuide* or a PDF of the print guide to your website can be a cost-effective way to provide clients and others with information about the latest tax laws and tax planning strategies. But you can't assume that just because you post the guide on your website it will be seen and read. If someone doesn't visit your website and click to view your tax guide, it won't matter that it's there.

That's why you may want to do things like the following to increase the viewing and impact of your online tax guide:

Highlight your online guide on your website.

On your home page — as well as other appropriate pages, such as your tax services page — use an eye-catching element to make the link easy to find and encourage visitors to view it. This might consist of:

- An image of the guide or of something representing taxes or tax planning
- Large or bolded text in a header, body copy, a box or a sidebar that invites visitors to look through your guide and that links to it, so they can get to it with just a click.
- You might even consider running a tax quiz or game on your website that encourages visitors to look up the answers in your online guide.

Use other communications to drive traffic to your guide.

In your emails (especially in the signature line), social media posts, correspondence, newsletters, press releases, marketing materials and other communications, include an invitation to visit your website and view your online tax guide. Just be sure to include a hyperlink to (or the URL for) the web page where visitors can view the guide.

Send an email about your online guide to clients, prospects and referral sources.

To let clients and others know about your online guide, you can email them a link to the page on your website where they can view it. For *WebTaxGuide*, consider using our email *Flex-E-TaxGuide*, which features a template that links directly to the *WebTaxGuide*.

Use social media to draw attention to your tax guide.

Post an announcement about your online guide on your firm's social media pages and highlight it with an engaging and attention-getting headline. A post like this will help awareness of your guide and encourage visits to your website to view it and learn more about your tax services. Be sure to include your website URL.

In addition, consider posting things like these to drive visitors to your online guide through your social media pages:

- Tax-related information that connects readers to your online guide; for example, a "tax tip of the day," "best tax-saving idea of the week" or "monthly tax fact"
- A summary of a tax-planning issue or strategy, with a link to the page in the online guide that discusses it more fully
- A question for which readers can find the answer in your tax guide
- Periodic reminders about the need for tax planning, with a link to your online guide

Also, encourage partners and other members of your firm to post an announcement about your online guide, as well as things like those described above, on their personal social media pages. Staff involvement and engaging messages are key components to the success of your social media program. So encourage your staff to interact with your social posts to maximize the reach and impact of your shared content.

Here are instructions and suggestions for using Facebook, LinkedIn and Twitter to announce and drive traffic to your online tax guide:

Facebook

In either the “Home” or “Timeline” view on your company page, click on the “Post” field (blue pencil icon) and paste the URL for your online guide (or for a specific page) into the status update box.

Facebook will automatically pull in any available title, description and image related to the URL. You can type over the link to add any description or comment you like, and you can edit the pulled-in information by clicking on a specific area and typing over any portion of the information in the text box that appears for editing.

If images are available, you can choose the one you’d like to appear in your post by scrolling through the options displayed as arrow icons in the upper-left corner of the image area. Or you can choose to upload your own image by clicking the “Upload Image” option at the bottom of the image area.

You can either click the blue “Post” button to immediately post your message, or you may schedule a post by clicking on the gray clock icon in the lower-left corner of the window, and then selecting the date and time you want the post to appear on your Timeline. Scheduled posts can then be saved by clicking the “Schedule” button.

LinkedIn

On your LinkedIn company page, paste the URL for your guide in the “Share an Update” field. You can overwrite the URL with a header and message of your choosing, and you can edit that text by clicking on it and using the editing boxes that appear.

You can use the image that appears with the post or add a new image by clicking on the blue square icon in the upper-right corner of the image to upload a new option. You can omit an image by unchecking the “Include Image” box beneath the post summary; but this is not recommended, because images boost engagement.

You can choose to share your post with either “All Followers” or a “Targeted Audience,” such as companies of a certain size or location, or employees of a certain function or seniority. Your firm must have at least 100 followers to use the targeting feature. Once you’ve made your selection, click the blue “Share” button to post it.

Twitter

Using your desktop view, click on the “Tweet” button (box icon with feather pen) located in the upper-right corner of your Twitter account.

Compose a short message (limited to 140 characters) related to your online guide. To overcome this limitation, you can include relevant keywords and hashtags, such as #tax, #tax_planning or #IRS, so your guide-related messages can be searched for and found on the Twitter platform. But don’t include too many hashtags, so your tweet is not treated as junk or spam.

Paste the URL to your online guide (or a specific page in it) after your text in the “Compose new Tweet” window. Twitter will automatically shorten your link and let you know when you have exceeded the 140-character limit. You can also use a third-party social media management tool to shorten your link in advance of posting your update. You can add a photo or image to your Tweet by clicking on the “Add Photo” camera icon. Click the “Tweet” button to post your Tweet.

In addition to sharing Tweets, you can use the “Website link” field in “Twitter Profile options” to display the URL for your online tax guide.

Personalize the guide with your logo and contact information. For the *WebTaxGuide*, make sure each page is branded with your firm’s name and logo, and that the “contact us” button links to a page on your website that has the contact info you wish to include. For the PDF guide, have your logo and contact information on the front cover, and personalize the back and inside covers with information about your firm, services and partners.

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For the *WebTaxGuide*, make sure each page is branded with your firm's name and logo, and that the "contact us" button links to a page on your website that has the contact info you wish to include. For the PDF guide, have your logo and contact information on the front cover, and personalize the back and inside covers with information about your firm, services and partners.

Some personalization of your online tax guide may be free with your purchase. If you haven't already taken advantage of this opportunity to increase the effectiveness of your guide for building brand awareness and marketing your tax services, contact your Account Coordinator at 800-227-0498 for more information.

EMAIL TAX GUIDE

The *Flex-E-TaxGuide* enables you to send out a personalizable HTML email template that links to the *WebTaxGuide* (included). The *Flex-E-TaxGuide* comes with our *Flex-E-mail* distribution and tracking program, which allows you to see who opens your email and clicks on specific links, so you can identify possible leads. A template-only version of the *Flex-E-TaxGuide* is available for use in other email systems.

If you use a different email distribution system to send out links to your online guide, it's best to have the links open directly onto the guide (or the guide section you're directing attention to) or onto your home page, where ideally the link to your online guide is prominently displayed.

Here are some things you can do to maximize the likelihood that your tax guide email is opened and recipients click through to see the guide:

Think hard about the subject line.

Take care to craft one that gets recipients to open your tax guide email — for example, "Expired tax breaks you need to keep an eye on," or "Will one of these triggers subject you to the AMT this year?"

Personalize the sending address.

Clients and other intended readers are more likely to open an email addressed personally to them from one of your partners than a generic email from your firm. Recipients are also more likely to click on a link to your guide if there's a personal message from someone they know, especially if the message (or subject line) points out some tax law or strategy a partner thinks would be of particular interest to a recipient.

If you use the *Flex-E-TaxGuide*, you can easily download each partner's list separately, add the partner's personal message on the page that appears when the email opens, and send it out with an address that makes it look as if the email is coming directly from the partner. The *Flex-E-TaxGuide* also makes it easy to segregate your mailing list into groups, such as business owners or high net worth individuals, and send an email that links directly to the section(s) of the guide that may be of special interest to them.

Make sure you have a good, up-to-date list (and permission to email).

As in direct mail, the quality of your list is perhaps the single biggest determinant of a campaign's success. Email addresses change more frequently than postal addresses, so you'll need to regularly maintain your database if you want to avoid a lot of bounce-backs.

Of course, if you don't have an email address for everyone you want to send a tax guide to, you'll need to get it. Just make sure you also have permission to email everyone you'd like. If you email people, such as prospects, without their permission, you'll annoy them and possibly risk being blacklisted for sending spam.

Follow up with a phone call or another email.

To leverage emails about your tax guide, consider having members of your firm follow up with a phone call to see if they could answer any questions about the subjects the guide discusses. If you use *Flex-E-TaxGuide*, you'll have tracking information that shows what topics recipients have clicked on. So you'll have an even firmer basis for making a follow-up call (or sending a follow-up email) to ask if you can provide any further information about those or other tax topics.



Use the tax guide template for other tax-related communications.

You can use the *Flex-E-TaxGuide* or other template to send out additional tax-related information that drives clients and prospects to your *WebTaxGuide*; for example, you could email the quarterly tax guide update summaries we provide for informing your clients and other contacts about updates made to the *WebTaxGuide*, with links to them. You could also use the template to highlight a different tax topic on a monthly basis and encourage recipients to view the online guide for more information. Or, to target various audiences, you could periodically send out an email that links to a specific section of the *WebTaxGuide*.

Remember that you can use the *Flex-E-Mail* system — which includes more than 50 templates — to send out other email communications for your firm, too. Your account allows you to send up to 1,000 emails per month, and you can purchase additional capacity if needed. By including a link to your online guide in these other emails, you can boost the number of people who view it.

PRINT TAX GUIDE

Print tax guides are a tangible representation of your firm. With their booklet design and extensive areas for personalization, they can make a strong impression that enhances your professional image. Print guides therefore give you a great way to introduce your firm to prospects or remind clients and referral sources about your tax services. Many readers will keep them as reference items, so these booklets will help increase brand awareness and have a favorable impact long after you distribute them.

Include the print guide in mailings, information packets and proposals.

The print guide is perfect for use in direct mail campaigns aimed at informing your target audience about tax law changes, presenting strategies they can use to reduce taxes, and suggesting that they contact you for tax planning and preparation services. You can also include copies in other mailings, as well as welcome packets or proposals, and display some in your reception area and client meeting rooms.

Hand out your guide at seminars, meetings and conferences, or use it for follow-up.

This can provide a way to start conversations with recipients by pointing out sections to look at. Partners can hand out the guide at trade shows, conferences and networking events, present it in meetings with clients and prospects, or send it out afterward to follow up with people they met.

Send out the guide as a thank-you or holiday gift.

The print tax guide is a great way to thank clients for their business. Include copies with tax returns or financial statements, send them out as a thank-you for payment, or present them as a birthday or holiday gift.

Follow up with a phone call or email.

Giving or sending out the tax guide provides a basis for following up with a phone call or email to see if you could be of assistance or answer questions about the subjects discussed. A phone conversation can help you learn about the taxpayer and identify ways you might be of service. At a minimum, the call helps to strengthen your relationship and can lead to an in-person meeting or request for assistance at a later time.

WHY USE BOTH PRINT AND ELECTRONIC GUIDES

To maximize the marketing impact of your tax guide, consider using both print and electronic formats. Not everyone prefers email, and open rates can be less than you would like. Similarly, many in your target audience may not read your social media posts or visit your website, so they may never see your guide and the branding or message you have on it. To make it more likely that members of your target audience at least look at your guide, you'll need to present it in the format and deliver it via the medium they prefer. To this end, you may want to send an email, post a form on your website, or ask in a conversation which format and means of delivery a client, prospect or referral source prefers. Enter these preferences into your database, and deliver your guide accordingly. Integrating print and email guides will enable you to optimize both impact and cost-effectiveness.

MORE WAYS TO MARKET YOUR TAX PRACTICE

TAX SEMINARS

Presenting seminars is a proven way to demonstrate your expertise, build new client relationships, strengthen existing ones and increase interest in your tax services. The Checkpoint® Marketing for Firms *Tax Planning Seminar* enables you to conduct successful tax seminars quickly, easily and cost-effectively. This professionally produced PowerPoint® presentation — with speaker notes — includes content for general tax clients and business owners, as well as for high-income individuals.

To get the most from your *Tax Planning Seminar*, brand the slides with your logo, insert your contact information, and edit the slides and notes as you like for different audiences. For example, you can leave out certain slides or add content of your own to create mini-presentations focusing on specific tax planning subjects.

In addition, be sure to plan your seminars carefully. Allow enough time (it's good to start about 12 weeks out) for choosing a venue, advertising the seminar, sending invitations, and arranging for equipment and refreshments.

Also, make sure your presenters are well rehearsed and you have a strategy for having firm members make contact with participants during the event and follow up afterward. As mentioned above, giving participants a copy of the print *Tax Planning Guide* as a takeaway will help keep your firm name top of mind and encourage contact for more information or assistance.

TAX LAW UPDATES

To help you show thought leadership and position your firm as an expert on tax matters, if a major tax law change occurs before the first of July following your purchase of our tax guide, you'll receive an email *Tax Law Change Update*. You can post it on your website and email it (or a link to it) to clients, prospects and referral sources to inform them about the change. You can even print it out on your letterhead or template to use as a handout or include with guides you have yet to distribute.

If you've purchased the *WebTaxGuide* or the *Flex-E-TaxGuide*, affected pages of your online guide will automatically be updated as changes occur. But proactively notifying your contacts about updated information can help position your firm as a thought leader. To this end, you can use either your *Flex-E-Mail* account or another email program to distribute the update.

By immediately emailing the updates to clients and contacts, you can quickly and easily get the word out about tax law changes — and position yourself as an advisor who's on top of the latest developments in tax law. The updates also give you another opportunity to “touch” your target audience and keep your name top of mind with clients, prospects, referral sources and the media.

TAX RATES CARD

To enable you to easily provide clients and contacts with information about important tax rates, standard deductions and exemption amounts — and keep your name top of mind for tax services — we've developed the *Federal Tax Rates Card*. This handy summary of key tax information gives you a cost-effective way to show that you care about helping clients minimize their taxes. Use the 2015 version through the end of the year, and purchase the *2016 Federal Tax Rates Card* next January. The card can be imprinted with your name, logo and contact information and used to heighten brand awareness by:

- Inserting it in your tax guide or newsletter, and including it in other marketing communications
- Sending it out with invoices, statements or other mailings
- Handing it out at meetings or seminars
- Giving it to clients and referral sources as a thank-you or follow-up
- Providing the tax rate card to members of your firm as a handy reference piece.

NEWSLETTERS AND OTHER CONTENT MARKETING TOOLS

Because regular contact is essential for converting prospects into clients and developing new business from existing clients, we recommend that, in addition to the tax guide, you also email or mail out a personalized tax newsletter to share helpful information on a year-round basis. This will help your firm cultivate prospects, keep in touch with clients and stay top of mind for tax services.

Most of our newsletters deal with tax issues, often on a niche-specific basis. But you may especially want to consider *Tax Impact*, *Focus*, *Management & Tax Concepts* and *Trendlines*, which address a broad range of tax subjects relevant to individuals and businesses. *Planning for Prosperity* covers financial and tax planning for individuals, while *Insight on Estate Planning* and *The Estate Planner* discuss strategies for minimizing taxes associated with transferring assets from one generation to the next.

If you'd like to provide employers with information on tax-related and other developments associated with the Affordable Care Act, consider sending out our *Health Care Reform Monthly* newsletter. And if you have clients who do business overseas or are expatriates, check out *International Tax Monthly*.

To communicate more frequently, you can also email, mail or post our *Tax and Accounting Alerts* (roughly 18 per year), or use our weekly *Tax Briefs for Social Media* for your blog or and website or social media posts. The *Tax Briefs* program includes banner ads to highlight the posts on your website and Facebook page.

If you post the *Alerts* or *Tax Briefs* on your website, you can use email or social media to push out short summaries of the alerts with links to the full text. You can do the same with tax-related articles from our online Content Store. Sharing these items will help demonstrate thought leadership, enhance your brand and encourage contact for tax services.

For key clients, or for those who have already received a tax guide, you might want to send the thank-you with a print copy of our estate planning guide, *Selecting the Best Estate Planning Strategies* (also available in PDF format). In addition, post the online *WebEstateGuide* version on your website and use the email version, *Flex-E-EstateGuide*, to push out the online guide to your target audience. And consider using our time-saving *Estate Planning Seminar* for presentations on ways to achieve asset protection and wealth transfer goals.

REMEMBER TO FOLLOW UP!

No matter how engaging and informative your tax guide and other content is, it still is not enough to simply send out or post a guide, newsletter, tax alert or article and wait for business to come in. You need to proactively contact prospects, clients and referral sources to see how you can be of service or answer questions about the subjects these publications discuss.

Also, consider having partners send a personal note or email after tax season to clients you helped with their taxes. The message can thank them for giving your firm the opportunity to be of service and encourage them to call with any tax-related questions. Follow-up like this can help ensure that clients look to you, rather than a competitor, for future tax services.



SAMPLE COVER EMAIL, COVER LETTER AND SOCIAL MEDIA POSTS

Following are an email, letter and social media posts you can use to present or announce your *Tax Planning Guide*. Note that in the email and letter, the items in brackets can be inserted or left out as you like, and you can add other language or edit the existing wording to tailor these sample messages to your specific needs.



2015-2016 TAX PLANNING GUIDE COVER EMAIL

[Subject:] Tax-saving ideas for uncertain times

Dear [Name]:

With many valuable tax provisions having expired Dec. 31, 2014 — not to mention continued uncertainty about tax reform — tax planning is more complicated yet more important than ever. To save the most, you need to not only take advantage of every tax break you're entitled to but also be prepared to act quickly if tax legislation is signed into law.

This is exactly what our [Tax Planning Guide](#) [LINK to the page on your website where you feature your online tax guide] is designed to help you do. To view it, simply click on the link above to visit our website, where you can navigate to the guide and learn about important tax law changes and ways to minimize your income tax liability.

As you look through the guide, please note the strategies and tax law provisions that apply to your situation or that you would like to know more about. Then contact us with any questions you may have about these or other tax matters.

[As our client, you know that] (Or, for prospects) [At {Your Firm Name},] (Or, for referral sources and media contacts) [As you know,] our professionals are thoroughly familiar with the latest tax laws and tax-reduction strategies, and are eager to help you take full advantage of them. So please send a reply email or call us today at [your phone number] to schedule a time to talk about ways to lighten your tax burden and better achieve your financial objectives.

Sincerely,

[Firm Name]

[Signature]
[Your name, title]



2015-2016 TAX PLANNING GUIDE COVER LETTER

[Date]

[Name, address]

Dear [Name]:

With many valuable tax provisions having expired Dec. 31, 2014 — not to mention continued uncertainty about tax reform — tax planning is more complicated yet more important than ever. To save the most, you need to not only take advantage of every tax break you're entitled to but also be prepared to act quickly if tax legislation is signed into law.

This is exactly what our Tax Planning Guide is designed to help you do. We hope you find this complimentary copy helpful in understanding recent tax-related legislation and identifying steps you can take to reduce your personal and business tax liability. [You'll also find the guide on our website, _____com.]

As you look through the guide, please note the strategies and tax law provisions that apply to your situation or that you would like to know more about. Then contact us with any questions you may have about these or other tax matters.

[As our client, you know that] (Or, for prospects) [At {Your Firm Name},] (Or, for referral sources and media contacts) [As you know,] our professionals are thoroughly familiar with the latest tax laws and tax-reduction strategies, and are eager to help you take full advantage of them. So please contact us today at [your phone number] or [email address] to schedule a time to talk about ways to lighten your tax burden and better achieve your financial objectives.

Sincerely,

[Signature]

[Your name, title]



2015-2016 TAX PLANNING GUIDE SOCIAL MEDIA POSTS**For Facebook or LinkedIn**

Are you paying more income tax than necessary?

Everybody pays more tax than they like. But nobody wants to pay more than necessary. To minimize your tax liability, you need to plan carefully and take advantage of all deductions, credits and strategies tax law allows. This is exactly what our online tax planning guide can help you do. So visit our website and look through the guide. Then contact us to talk about ways to lighten your tax burden and better achieve your financial objectives. [Include your website URL.]

For Twitter

Worried that you're paying too much income #tax? Check out our tax planning guide with helpful #taxtips: [insert your firm's URL] #taxes

