TopLine Content Marketing

Tax Practice Marketing Guide

Contents

If you have any questions about ways to use your *Tax Planning Guide* or our other content marketing tools to build your tax practice, please call us at 800.896.4500 (Press 1)

INTRODUCTION

Informing clients and other taxpayers about strategies for saving tax and achieving their financial goals is a proven way to position your firm as a thought leader and encourage contact that builds and strengthens client relationships. This is exactly what the TopLine Content Marketing ***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 your guide in a way that maximizes readership, as well as leverage it with other activities, such as emails, social media posts 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 online formats,
- Suggest other tools for marketing your tax practice, and
- Provide a sample email blast, social media post and cover letter to promote your guide.

Our goal is to help you increase awareness of your tax services and encourage your clients and prospects 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 tools and strategies, please contact us at toplinecontentmarketing@cpasitesolutions.com.

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 GUIDE

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

Highlight your 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 your ***WebTaxGuide***. This might consist of:

- An image of your guide or of something representing taxes or tax planning, and
- 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 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 ***WebTaxGuide***. Just be sure to include a hyperlink to (or the URL for) the web page where visitors can view your guide.

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

To let clients and others know about your ***WebTaxGuide***, you can email them a link to the page on your website where they can view it. We also encourage you to promote it through email throughout the year, at least once per quarter. (See page 7 for a sample email blast.)

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

Think hard about the subject line. Take care to craft one that gets recipients to open your email — for example, "Are you taking all of the tax breaks available to you?"

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 your ***WebTaxGuide*** 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.

Use social media to draw attention to your guide

Link to your ***WebTaxGuide*** from your firm's social media pages and highlight it with some engaging and attention-getting text and an image. A post like this will help increase awareness of your guide and encourage visits to your website to view it and learn more about your tax services.

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

- Tax-related information that connects readers to your 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 your guide that discusses it more fully,
- A question for which readers can find the answer in your guide, and
- Periodic reminders about the need for tax planning, with a link to your guide.

(See page 8 for a sample social media post.)

Also, encourage partners and other members of your firm to post about your ***WebTaxGuide***, 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 some platform-specific instructions and suggestions for using social media to drive traffic to your ***WebTaxGuide***:

How to post your *WebTaxGuide* on Facebook

1. Click the **Facebook icon** in the upper corner of your guide's homepage. You may have to login to your firm's Facebook page first.
2. In the **Create post** window, write a message to accompany your guide in the **What's on your mind?** field if you'd like.
3. Click **Next**, then **Share**.

Your guide will be posted with the main header image from your ***WebTaxGuide***.

How to share your *WebTaxGuide* on LinkedIn

1. On your **LinkedIn company page**, paste the URL for your ***WebTaxGuide*** into the **What do you want to talk about?** box.
2. Add any message you'd like to include with the link.
3. To add the header image:
    - Download the image we provided and save it to your computer.
    - In the share window, click the **edit icon**, then the **camera icon**.
    - Select the downloaded image from your files and click **Done**.
4. Click **Post**.

Your ***WebTaxGuide*** will be published with the header image.

You can also feel free to add any relevant hashtags you would like, so your ***WebTaxGuide*** can be found more easily.

PRINT GUIDE

Print ***Tax Planning Guides*** (seasonal, generally available for purchase August through December), 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 guide in mailings, information packets and proposals

The print ***Tax Planning Guide*** is perfect for use in direct mail campaigns aimed at presenting strategies your target audience can use to reduce taxes and suggesting that they contact you for tax planning and preparation services as well as information on tax law changes. (See page 9 for a sample cover letter you can include in your print guide mailing.) 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.

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

The print ***Tax Planning 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.

WHY USE BOTH PRINT AND ONLINE GUIDES

To maximize the marketing impact of your ***Tax Planning Guide***, consider using both print and online formats. Not everyone prefers email, and open rates can be less than you would like. Similarly, some in your target audience may not read your social media posts or visit your website, so they may never see your ***WebTaxGuide*** and the branding or message you have on it. To make it more likely that all members of your target audience will look at your guide, you'll need to present it in the format and deliver it via the medium each one prefers.

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 online guides will enable you to optimize both impact and cost-effectiveness.

REMEMBER TO FOLLOW UP!

Whether you've chosen the online or the print version of the ***Tax Planning Guide*** (or both), you'll increase your marketing success by proactively following up with prospects, clients and referral sources. Email or call contacts to see if they have questions about the topics covered. 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.

Also, consider having partners send a personal note or email to clients after tax season. 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.

MORE WAYS TO MARKET YOUR TAX PRACTICE

TAX LAW UPDATES

To help you show thought leadership and position your firm as an expert on tax matters, if you've purchased the ***WebTaxGuide*** and there are tax law changes, the affected pages will automatically be updated after changes occur. But proactively notifying your contacts about updated information can help position your firm as a thought leader.

By quickly getting the word out about tax law changes, you can position yourself as an advisor who's on top of the latest developments in tax law. This can also keep your name top of mind with clients, prospects, referral sources and the media.

NEWSLETTER, SOCIAL MEDIA 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 using the ***Tax Planning Guide***, you 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.

We can help. Most of our newsletters deal with tax issues, often on a niche-specific basis. But you may especially want to consider *Tax Impact*, which addresses a broad range of tax subjects relevant to individuals and businesses. *Wealth Management Advisor* covers financial and tax planning for individuals, while *The Estate Planner* discuss strategies for minimizing taxes associated with transferring assets from one generation to the next. All are available in both print and digital formats. Or consider our email newsletters, which offer a variety of content options and automated delivery.

To communicate more frequently, consider some of our other content options. You can use our *Emerging Tax and Regulation Alerts* (at least 18 per year) or our weekly *Individual Tax Briefs* or *Business Tax Briefs* on your blog or social media. Or post content daily with our *Federal Tax Posts*.

You can also use email or social media to push out short summaries (included) with links to the full text of 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.

WEBSITES, SEO AND PAID ADS

There's more to tax practice marketing than just sharing ***Tax Planning Guides***, sending out newsletters and posting content on your blog or social media. And as part of the CPA Site Solutions family, we can help your firm:

Convert website visits to clients with a CPA Site Solutions accounting firm website. Get a custom website or choose from over 150 ready-to-go accounting website designs, all with rich and relevant content.

Climb to the top of search ranking with SEO. Clients that use our search engine optimization solutions see an ROI in excess of 300%.

Increase website traffic and customer acquisition with paid ads advertising. Our Pay-Per-Click Ads solution moves you to the top of the Google rankings to grow your practice.

Expand your social media reach with Facebook Ads. Our laser-focused campaigns zero in on your ideal clients, bringing you higher-quality leads and a superior ROI.

SAMPLE COMMUNICATIONS FOR PROMOTING YOUR GUIDE

Following are an email blast, social media post and cover letter you can use to promote 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.

EMAIL BLAST

[Subject:] Do you know how the recent tax law changes affect you?

Dear [Name]:

With most of the changes from the new tax law commonly referred to as the One Big Beautiful Bill Act going into effect in 2025 or 2026, tax planning is especially critical now. To save the most, you need to become familiar with how you may need to adjust your strategies.

This is exactly what our Tax Planning Guide [LINK to the page on your website where you feature your ***WebTaxGuide***] 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 the 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 may 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.

At [Your Firm Name], our professionals are thoroughly familiar with the latest tax law developments 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]

SOCIAL MEDIA POST

For Facebook or LinkedIn

Do you know how the changes from the new tax law commonly referred to as the One Big Beautiful Bill Act affect you? To save the most on your taxes, you need to become familiar with how you may need to adjust your tax planning strategies. 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.]

COVER LETTER

[Date]

[Name, address]

Dear [Name]:

With most of the changes from the new tax law commonly referred to as the One Big Beautiful Bill Act going into effect in 2025 or 2026, tax planning is especially critical now. To save the most on your taxes, you need to become familiar with how you may need to adjust your strategies.

This is exactly what our Tax Planning Guide is designed to help you do. We hope you find this complimentary copy helpful in 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.

At [Your Firm Name], our professionals are thoroughly familiar with the latest tax law developments 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]