YOU’LL MAKE A BIGGER IMPACT ON YOUR CLIENTS’ FINANCIAL LIVES.

BEFORE: Free focusing on compliance work...
- Spend more than 50% of your time on billing and collection processes.
- Only work on tax returns in high-volume seasons.

AFTER: Focus delivering bundled services...
- Automate subscription billing to get more time back.
- Sell knowledge: Share expertise with clients, helping them thrive.

YOU’LL FIND NEW TIME TO PROVIDE MORE VALUE TO YOUR CLIENTS.

BEFORE: Pros focusing on compliance work...
- Charge business clients an average of $471.65 for tax preparation.
- Process work in annual transactions, leading to seasonality spikes and dips in revenue.

AFTER: Pros delivering bundled services...
- Charge more for basic bundles, including tax preparation and proactive tax planning.
- Charge monthly, leading to more consistent and dependable cash flow throughout the year.
- Grow their tax and accounting firms by 10% with the same staff, on average.

YOU COULD MAKE MORE REVENUE AND HAVE MORE INCOME DEPENDABILITY.

BEFORE: Pros focusing on compliance work...
- Don’t offer business clients a choice in the types of services they receive.
- Have business clients who perceive the practice as “reactive.”

AFTER: Pros delivering bundled services...
- Can offer more levels of service to clients, with the ability to upsell as clients’ needs change.
- Make business clients who perceive the practice as “proactive.”

YOU’LL MAKE A BIGGER IMPACT ON YOUR CLIENTS’ FINANCIAL LIVES.

1. 2019 Client Accounting Services Report, Bill.com, pg 9
2. Intuit ProConnect Market Study, .. Dec., 2010, N = 465
5. Harris, Steven B. “The Rise of Advisory Services in Audit Firms.” Public Company Accounting Oversight Board. Nov. 24, 2014. https://pcaobus.org/News/Speech/Pages/11242014_harris.aspx. “Revenues for on-audit services at Big 4 firms have grown at an average rate of about 10% in recent years, while revenues for non-audit services have grown at a much faster pace.”