

How Much Do You Really Earn?????

Description	Amount
Total Firm Profit:	\$
Net Income:	\$
+ Officer's Compensation and Benefits:	\$
Total Officer's Profit:	\$
Divided by Total Hours Worked:	\$
→ \$ per hour	

Firm Profitability Calculator

Tax Savings Worksheet

Tax Strategies	Tax Savings Created
Idea 1:	\$
Idea 2:	\$
Idea 3:	\$
Idea 4:	\$
Total Potential Savings	\$
Value Based Fee	\$
Return on Investment to Client	\$



Tax Client Evaluation Form

Client Name	
Evaluated By	
Date	

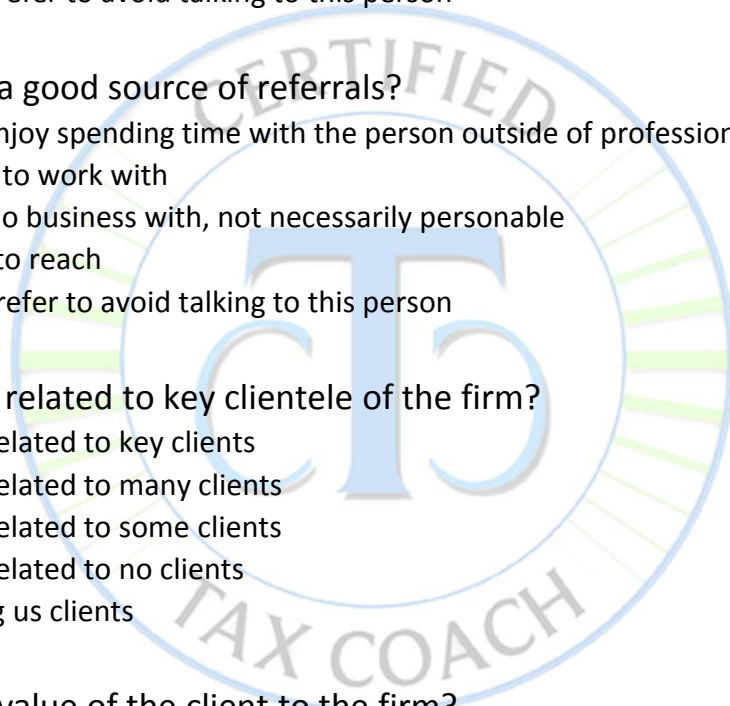
1. How well do you enjoy working with the client?
 - 10 Would enjoy spending time with the person outside of professional setting
 - 9 Pleasant to work with
 - 8 Easy to do business with, not necessarily personable
 - 7 Difficult to reach
 - 6 Would prefer to avoid talking to this person

2. Is the client a good source of referrals?
 - 10 Would enjoy spending time with the person outside of professional setting
 - 9 Pleasant to work with
 - 8 Easy to do business with, not necessarily personable
 - 7 Difficult to reach
 - 6 Would prefer to avoid talking to this person

3. Is the client related to key clientele of the firm?
 - 10 Closely related to key clients
 - 9 Closely related to many clients
 - 8 Closely related to some clients
 - 7 Closely related to no clients
 - 6 Is costing us clients

4. What is the value of the client to the firm?
 - 10 >\$15,000 per year
 - 9 \$10,000-\$15,000 per year
 - 8 \$5,000-\$10,000 per year
 - 7 \$2,500-\$5,000 per year
 - 6 \$500-\$2,500

5. Organization
 - 10 Highly organized, information comes in when requested
 - 9 Information comes in when requested, messy
 - 8 Additional information requests take up to a week
 - 7 Additional information requests take up to 2 weeks
 - 6 Insufficient data provided



Tax Client Evaluation Form

6. How often does the firm sell services to the client?
- 10 Engages in 4 or more annual firm services
 - 9 Engages in 3-4 annual firm services
 - 8 Engages in 2-3 annual firm services
 - 7 Engages in only 1 annual firm service
 - 6 Engages in less than annual services
7. Does the client pay their fees on time?
- 10 Prior to services
 - 9 On delivery of invoice
 - 8 Within 15 days of invoice
 - 7 Within 30 days of invoice
 - 6 Longer than 30 days of invoice
8. % of Total Firm Revenues?
- 10 >10% of firm revenues
 - 9 5-10% of firm revenues
 - 8 3-5% of firm revenues
 - 7 2-3% of firm revenues
 - 6 <2% of firm revenues
9. Does the client expose the firm to liability
- 10 No risk
 - 9 Little Risk
 - 8 Some Risk
 - 7 Average Risk
 - 6 High Risk
10. What is the opportunity for growth or new services with client?
- 10 Expanding, new possible service sales
 - 9 Slow growth
 - 8 Level growth
 - 7 Decreasing growth, may cut back on services
 - 6 Leaving business soon

TOTAL SCORE _____

Score Key

A	90 – 100
B	80 – 89
C	70 – 79
D	60 – 69



Pricing Pre-Work

1. What price is so high the client would think about not moving forward?
2. What price is so high but the client would still buy?
3. What price is your service considered inexpensive?
4. What price is so cheap that it diminishes the perceived value of the service?
5. What are your costs and acceptable profit markup that leads to your big picture vision for your firm and exit strategy?
6. What price would make you jump up and down yelling YES! When the client accepts?

It's vital that you master communicating about the details of your service (this means being clear yourself on what you actually DO), and explaining things in a way that leave your client feeling great about doing business with you and can recognize the difference in what you do as compared to your competitors. Mess this part up, and your value pricing model will never get off the ground.