

# How to Get Your First 50 Tax Clients

A practical workbook for building your first client base without paid ads.



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Name \_\_\_\_\_

Date \_\_\_\_\_

# The First 50 Client Map

Your first fifty clients come from three predictable places. Work them in order — trust and proximity first, visibility last.



## 1–15

### Warm Market

People who already know you, like you, or trust you.



## 16–35

### Referral Partners

Professionals who already serve your future clients.



## 36–50

### Local Visibility

Google profile, reviews, community, and simple content.

## EXERCISE

Write your target date for reaching 50 clients.

Target date \_\_\_\_\_



# Your Client Scope

Clarity on scope keeps you confident and out of trouble. Check what you are trained and ready to handle this season.

## I am prepared to serve

- ☐ Individual W-2 clients
- ☐ Families with dependents and credits
- ☐ Self-employed Schedule C clients
- ☐ Other:

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## I am not yet prepared to serve

- ☐ S-Corp returns
- ☐ Partnership returns
- ☐ Complex multi-state returns
- ☐ Trusts and estates
- ☐ Other:

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# Your Simple Offer

A clear offer is easy to understand, credible, and repeatable. Complete the sentence, then refine it until it sounds like you.

“I help [audience] with [service] so they can [result].”

## DRAFT 1

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## DRAFT 2

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## FINAL VERSION

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# Basic Fee Structure

You do not need a perfect fee schedule — you need enough structure to quote confidently. Use this as a working draft.

| Return type                          | Starting fee | Notes |
|--------------------------------------|--------------|-------|
| Basic individual return              | \$ _____     |       |
| Individual with credits / dependents | \$ _____     |       |
| Schedule C add-on                    | \$ _____     |       |
| Rental property add-on               | \$ _____     |       |
| Prior-year return                    | \$ _____     |       |
| Notice review                        | \$ _____     |       |

**Tip:** Price fairly without apologizing. Being new is not a reason to underprice your work.

Additional notes:

# Warm Market List

Write 50 names — friends, family, former coworkers, neighbors, community contacts, people you have helped before. Do not filter. Just fill the list.

| #  | Name | Relationship | Contact method | Status |
|----|------|--------------|----------------|--------|
| 1  |      |              |                |        |
| 2  |      |              |                |        |
| 3  |      |              |                |        |
| 4  |      |              |                |        |
| 5  |      |              |                |        |
| 6  |      |              |                |        |
| 7  |      |              |                |        |
| 8  |      |              |                |        |
| 9  |      |              |                |        |
| 10 |      |              |                |        |
| 11 |      |              |                |        |
| 12 |      |              |                |        |
| 13 |      |              |                |        |
| 14 |      |              |                |        |
| 15 |      |              |                |        |
| 16 |      |              |                |        |
| 17 |      |              |                |        |

## Warm Market List *continued*

| #  | Name | Relationship | Contact method | Status |
|----|------|--------------|----------------|--------|
| 18 |      |              |                |        |
| 19 |      |              |                |        |
| 20 |      |              |                |        |
| 21 |      |              |                |        |
| 22 |      |              |                |        |
| 23 |      |              |                |        |
| 24 |      |              |                |        |
| 25 |      |              |                |        |
| 26 |      |              |                |        |
| 27 |      |              |                |        |
| 28 |      |              |                |        |
| 29 |      |              |                |        |
| 30 |      |              |                |        |
| 31 |      |              |                |        |
| 32 |      |              |                |        |
| 33 |      |              |                |        |
| 34 |      |              |                |        |



Warm Market List *continued*

| #  | Name | Relationship | Contact method | Status |
|----|------|--------------|----------------|--------|
| 35 |      |              |                |        |
| 36 |      |              |                |        |
| 37 |      |              |                |        |
| 38 |      |              |                |        |
| 39 |      |              |                |        |
| 40 |      |              |                |        |
| 41 |      |              |                |        |
| 42 |      |              |                |        |
| 43 |      |              |                |        |
| 44 |      |              |                |        |
| 45 |      |              |                |        |
| 46 |      |              |                |        |
| 47 |      |              |                |        |
| 48 |      |              |                |        |
| 49 |      |              |                |        |
| 50 |      |              |                |        |

Notes:

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# Warm Outreach Script

Be clear, direct, and useful. You are not begging — you are letting people know you offer a professional service.

“

Hi [Name], I wanted to let you know I'm opening my tax preparation practice this season. I'm focusing on individual returns and self-employed clients, including freelancers, gig workers, and small business owners who file Schedule C. If you know anyone who needs help this year, I'd be grateful if you kept me in mind.

My version:

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# Follow-Up Script

A short, professional follow-up keeps you top of mind without pressure.

## FIRST FOLLOW-UP

Just circling back. If anyone asks you for a tax preparer this season, feel free to send them my way. I'm happy to do a quick fit call.

My version:

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## SECOND FOLLOW-UP

Tax season is getting close, so I wanted to send one last reminder. If you or someone you know needs tax prep help, I'd be glad to help if it's a fit.

My version:

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# Referral Partner List

Target 20 partners. One good partner who sends you 5–10 clients per season can change your first year.

| Partner type      | Name | Contact | Date | Next step |
|-------------------|------|---------|------|-----------|
| Bookkeeper        |      |         |      |           |
| Insurance agent   |      |         |      |           |
| Realtor           |      |         |      |           |
| Payroll provider  |      |         |      |           |
| Attorney          |      |         |      |           |
| Financial advisor |      |         |      |           |
| Business coach    |      |         |      |           |
| Mortgage broker   |      |         |      |           |
|                   |      |         |      |           |
|                   |      |         |      |           |
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|                   |      |         |      |           |
|                   |      |         |      |           |

# Referral Partner Pitch

Make it about their client. Partners want to know you'll make them look good, communicate professionally, and stay in your lane.

“

I'm building a tax preparation practice focused on individual and self-employed clients. I'm looking to build a small referral network with professionals who serve the same audience. If you have clients who need tax prep help, I'd be glad to take care of them and keep the process smooth.

My version:

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# Consultation Call Script

Ask, diagnose, quote, close. Specificity converts — never leave the next step vague.

## OPENING

"Tell me what changed for you this tax year."

## Questions to ask

1. What types of income did you receive?
2. Did you receive W-2s or 1099s?
3. Did you have self-employment income?
4. Did you have business expenses?
5. Did you receive any IRS or state tax notices?
6. Did you file last year?
7. Are there any prior-year returns missing?

## QUOTE LANGUAGE

Based on what you've described, my fee starts at \$\_\_\_\_\_. Once I review the documents, I'll confirm the final fee before preparing the return.

## Notes:

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# Google Business Profile Checklist

If you serve clients locally, this is where visibility begins. Complete each item, then post updates through tax season.

☐ Business name

☐ Business category

☐ Phone number

☐ Website or landing page

☐ Service area

☐ Hours

☐ Photos

☐ Service descriptions

☐ First post

☐ Review request process

**Notes:**

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★ ★ ★ ★ ★ 4.9 (127 reviews)

OPEN NOW



# Review & Referral Ask

The relationship doesn't end when the return is filed — that's where repeat business begins.

## REVIEW REQUEST

I'm glad we were able to get your return completed. If you were happy with the experience, a short Google review would help my new practice a lot.

My version:

## REFERRAL REQUEST

If you know anyone else who needs help this tax season, feel free to send them my way.

My version:

General notes:



# Your 30-Day Action Plan

Repeat the cycle until you reach 50. The work is simple — consistency is the hard part.

## Week 1

### Set the foundation

Define your offer, pricing, intake process, document collection, and consultation script.

☐ Completed

## Week 2

### Warm outreach

Contact 50 warm-market people. The goal is awareness and referral activity.

☐ Completed

## Week 3

### Referral partners

Contact 20 potential partners. Aim for 5 real conversations.

☐ Completed

## Week 4

### Local visibility & follow-up

Build your Google profile, ask for reviews, post content, follow up with everyone.

☐ Completed



# Scorecard

Track the inputs, not just the outcomes. Activity is what produces your first 50 clients.

| Metric                      | Goal                  | Actual      |
|-----------------------------|-----------------------|-------------|
| Warm contacts sent          | 50                    | <div></div> |
| Referral partners contacted | 20                    | <div></div> |
| Consultation calls booked   | 10                    | <div></div> |
| Clients closed              | 5–15 initial          | <div></div> |
| Reviews requested           | 100% of happy clients | <div></div> |

Notes:



# Your first 50 clients are possible.

The work is simple. The consistency is the hard part. MuseSpring is with you every step of the way.