

*Do you love the daily struggle of building your business? Squeezing 12 hours of work into a 10-hour day, finding clients, keeping clients, and managing staff to do it? Then **STOP READING!** Toss this in the recycle bin and go back to work, because this is **NOT** for you!*

*But if “outsourcing” the day-to-day hassles of finding clients and keeping clients sounds good to you . . . along with more time for family, friends, and life . . . then keep reading . . .*

## **Here’s How to Cure Your Toughest Practice Development Headaches, TaxCoach™ Style!**

**Dear TaxCoach™ Member:**

My name is Ed Lyon, and for over four years now, my partner Keith VandeStadt and I have helped over 1,287 tax professionals just like you to grow your businesses.

**Our TaxCoach™ system gives you the tools you need to price, promote, and deliver a new kind of tax planning service.** “Plain-English” tax planning. Concepts and strategies that cut your clients’ taxes – and give them immediate, measurable savings!

**We’ve helped members launch new practices from scratch and take existing practices to whole new levels.** Members like Dominique Molina who billed \$178,000 in tax-planning fees in 2008 alone. Members like Pam Burns, who launched her practice with zero local clients on October 1, 2007, and completed 286 returns the following season, including over 80 partnership and corporation returns.

**We’ve given you tools to make you heroes to your clients.** As part of that process, we’ve created two “elite” programs. They include:

- **TaxCoach™ Press Club:** A complete “done for you” referral generation, online marketing, client retention, and masterminding/coaching system
- **TaxCoach™ All-Stars:** Our Masterminding and Coaching program to help you reach your individual practice goals.

**Your best clients have always looked to you for concepts and strategies that give them the savings they *really* want.**

**But today’s economy makes tax planning even *more* important.** The Obama administration has made it clear that taxes are going higher and getting more complicated. Some commentators project marginal rates will have to rise as high as 70% to finance today’s crushing budget deficits and special priorities like healthcare reform.

**What do you think 70% tax rates would do to your business?**

**If you’re looking to make the *most* out of this historic tax-planning opportunity,** take a look at these programs and see which one is best for you!

## **TaxCoach™ Press Club: Area-Exclusive, “Done For You” Referral Generation, Online Marketing, and Client Retention Systems**

**Back in 2007, we surveyed you** and asked “What is your biggest business frustration?” And boy, were we surprised.

**The #1 frustration? Time management.** 28% of you said that finding time to manage your practice was your biggest frustration.

**The #2 frustration? Generating clients.** 25% of you said filling your practice was your biggest frustration.

**And the #3 frustration? Finding and managing staff.** 16% of you said making staff behave was your biggest frustration.

**What if we could help you solve *all three* problems?** What if we could grow your practice *for* you, without taking time from your day or adding new staff management headaches?

**You’ve heard the saying:**

*“Give a man a fish and he eats for a day.  
Teach him to fish and he eats for a lifetime.”*

Yeah, yeah, yeah. But . . .

**Sometimes you don’t *want* to learn how to fish.  
Sometimes you *just want the fish.***

**Filletted, on a plate, with rice pilaf and a nice beurre blanc sauce.** Maybe a glass of Chardonnay on the side.

## **GREAT NEWS!**

**Now we’re offering a complete “done-for-you” system to automate finding and keeping your clients . . . AND . . . give you more time away from the office than ever before!**

**Now we’re *giving you the fish!***

**We’re inviting you to enjoy a whole new practice.** One that’s more profitable, more predictable, and filled with more free time to get out of the office and enjoy what life has to offer!

**Let’s face it. The last thing you want is to work endless hours every day,** stuck at the office while your kids grow up and your spouse grows old. Missing family time, golf outings, and week-long spring vacations. Life’s just too short. Speaker Zig Ziglar once said “I never sat on someone’s deathbed and heard them say ‘I wish I spent more time working.’”

**If you're not making the money you want** – with as little hassle as possible – you might as well think of yourself as working 18-hour days when you consider all the worrying, frustration, and pressures you feel while you're away from the office!

**If you can't break away from your business**, then you don't really have a business . . .

## **You Have A Headache!**

**Remember how you pictured your practice when you started?** Working when you wanted. Plenty of clients lining up at your door. Making lots of money, but with plenty of time for the “fun” stuff there's never time to enjoy at the Big ~~Eight Six~~ Final Four.

**If you're like most TaxCoach™ members, you hung out your shingle with great expectations – then found yourself sinking in a sea of details.** In the words of Michael Gerber, author of *The E-Myth* and *The E-Myth Revisited*, you're working *in* your business – not *on* it. Leaving precious little time for the most important work of all – *growing* your business.

**So what's the solution?** Up until now, it's been “business in a box” kits, marketing seminars, and telemarketing programs.

**Kits and seminars work.** (I bought a couple myself when I launched my own practice.) The best of them give you good information, with plenty of useful tools and templates.

**The problem is, you have to make them work.** Even after you plow through the binder or get home from training, you still have to DO everything.

**Sales letters don't mail themselves!** You still have to target prospects. Decide what to “pitch” them. Write the letters, print them and stuff them, drive to the Post Office, measure your results, then test them again. (You *do* track campaigns against a control, don't you?)

**And that's just for the marketing.** Add that to all the other “jobs” sucking up your time and it's a wonder you get home in time for dinner!

**Telemarketing programs can still work, too.** (Of course, most prospects us have learned how to screen out cold calls. And “Do Not Call” lists make cold-calling a dicey proposition.)

**But who wants to spend a week learning how to hire and manage cold callers?** Who wants to replace them when they burn out? It's not hard to plow through a dozen or more in a single year.

**And telemarketing programs generally focus on writeup work.** What if you don't want writeup? What if your target clients don't need it? Where do writeup-based programs leave you then?

**Even if you *do* want the work, cold-calling writeup clients is a tough, *tough* sell.** It's like asking a six-year-old to eat his spinach. Writeup just doesn't have the “sex appeal” to lure great clients.

**Finally, telemarketing programs aren't exclusive.** One firm that teaches accountants how to hire, train, and manage telemarketers boasts of over 3,500 clients. That's great for them – but it means you can spend weeks of scarce time and thousands of scarce dollars hiring, training, and managing *your* cold caller to make the *same* pitch to the *same* prospects as your competition down the street!

**Imagine giving clients the *one thing they want more than anything.* (*Savings.*) Don't you think tax savings will open more doors than bookkeeping?**

**Now imagine you're the *only one in your area* offering it.**

**Sometimes you don't *want* to learn how to fish.**

**Sometimes you *just want the fish.***

**That's why we created the TaxCoach™ “Press Club” program.**

**Just one TaxCoach™ member per area gets to use this turn-key program.** That's good news *if* you secure *yours*. It's not so good if you hesitate – and get locked out.

**Since we rolled out “Press Club” two years ago,** and now with the “Wire Service” program in place and expanding rapidly, more territories are getting locked up by new members all the time, and now faster than ever!

**Before I lay out what the system includes, let me emphasize what it's NOT:**

- **NOT** a “business in a box” with a big fat 3-ring binder for you to implement on your own
- **NOT** a seminar or boot camp to implement yourself
- **NOT** a sales training program that forces you to become a smarmy “salesman.”
- **NOT** an “old school” cold-calling program that annoys prospects.

**Those sorts of practice development programs work – *if* you're willing to work them.**

**But sometimes you don't *want* to learn how to fish.**

**Sometimes you *just want the fish.***

So now let's see exactly what you get with TaxCoach™ Press Club:

## **1. Marketing Analysis**

**The program starts with a comprehensive Marketing Analysis.** Not canned – customized. Together, we'll evaluate your firm's strengths, weaknesses, opportunities, and threats. We'll evaluate the markets you target . . . the marketing messages you send them. . . and the media you use to deliver your message to your markets.

**Once we know who you're working with now, we'll identify your “A” clients.** Hone your marketing message and “unique selling proposition” to appeal to them like a “smart bomb.” Then craft a plan to *clone* them and *keep* them using referral generation *systems*, online marketing *systems*, and client retention *systems*.

## 2. Referral Machine

The next piece of the “Press Club” program involves *finding* clients. We’ve taken our best, most profitable marketing moves and created a push-button “referral machine,” ready to put to work for you.

If you’re like most TaxCoach™ members, you get your best clients from referrals. You already know that:

- **Referrals are easier to generate than any other client**
- Referrals are more likely to hire you than “cold” prospects
- **Referrals are less likely to haggle over fees**
- Referrals generally spend more with you
- **Referrals are more loyal clients**
- Finally, referrals are more likely to refer you themselves!

**In short, you know you should make referrals the centerpiece of your marketing.**

**But when I ask TaxCoach™ members what systems they have in place to generate those all-important referrals, I get blank stares and awkward silences.**

**So we’ve created a *system* to help you make the most of every client interaction.**

**How many referrals do you get now?**

**What would your business look like if you *doubled* that number? Then doubled it *again*?**

**The process starts with a “Done For You” Client Survey.** Just send us your list, and we do the rest. We customize the cover letter and survey form. Then we mail it to your clients, with a business reply envelope.

The surveys are designed to gather valuable client feedback, sure. But what they’re *really* designed to do is gather testimonials and actual referrals.

**The process continues with a comprehensive suite of scripts, templates, and checklists** for you and your staff . . . everything from A to Z, and made it “no-brainer” simple. And the best part is . . . nobody else in your area gets it!

## 3. Online Marketing & Automated Follow-up System

**If you’re like most TaxCoach™ members you have a web site.** Sort of. You signed up with one of the canned site providers. Or you hired a friend, a client, or a neighbor’s teenage kid to design it for you. You went online to boost your credibility, because you thought you “ought to” have a web site.

**But you're *not* getting results.** You don't know how many people visit your site. You don't have a clue where they come from. You have no idea how long they stay when they visit.

**Keith and I have studied and tested what works online.** We know how to lay out web sites that catch visitors' attention, capture their email addresses, and motivate them to pick up the phone and call. (Our visitors are worth over \$27.00 *each*. With some campaigns, over \$100.00 *each*. Are *your* visitors worth \$27.00? Do you even *know* what they're worth?)

**Our online marketing system and automated follow-up system lets you kiss your "online brochure" goodbye and start getting results.** We'll fix your canned copy. Give you custom direct-response tools to integrate directly into your site. Set up Google Analytics to track your visitors. Give them a reason to give you their email so you can follow up with them until they're ready to hire you.

**We'll give your visitors a reason to pick up the phone and call you,** eager to discover how you solve problems your competitors don't even address!

**Sure, you can do it all yourself.** But that would mean hours online and offline, studying direct-response copy, web site design and coding, and technical tools like autoresponders, squeeze pages, and "heat mapping." Then more hours crafting copy, testing headlines, and measuring results.

(You can probably change your car's oil, too. But I'll bet you don't!)

**Why turn yourself into an online marketing expert when TaxCoach™ can do it for you?**

#### **4. "Done for You" Email Client Retention System**

**The next piece of the "Press Club" program involves *keeping* clients.** Don't underestimate the importance of keeping clients you already have.

**Let's say you do a pretty good job keeping clients.** You lose just 10% of them from one year to the next. Now say you want to grow your practice 10%. Sound easy, right? But don't forget replacing the 10% you lose. You actually have to grow your practice 20% to reach your goal. Suddenly it looks a lot less easy!

**How many of us really do the work we need to "build a fence" around our clients?** In today's tough economy, just keeping the clients you have is more important than ever!

**Take weekly emails, for example.** We all know we should send our clients regular communication. But how many of us really do?

**There's no shortage of canned emails you can send.** But they're just that – canned. How many clients and prospects actually *open* the same emails they get from everyone else?

**Your client retention program starts with your client list.** Then we send them weekly tax and finance tips by email.

**These are short, informal discussions** – usually no more than 400-500 words – designed to get your prospects and clients to *open* them, read them, and appreciate your efforts in informing them.

**Sometimes the emails are serious.** What's the new administration planning for taxes? How can clients avoid new taxes? What should they be doing *now* to pay as little as possible?

**Sometimes the emails are lighter.** We've told clients about a British court case ruling that Pringles are "potato chips," and even discussed tax strategies for Somali pirates! (Our members reported *great* client feedback from that one!) Can you see how emails like that will actually get opened, read, and appreciated?

**Every email directs readers to call you with their questions.** That means every email helps build the relationships that are the lifeblood of your practice. (And the weekly emails also make great content for your blog!)

**We constantly get *unsolicited* testimonials from members reporting that the weekly emails are the best client communication they have ever done.** Members report getting calls back from prospects as well as existing clients every week – with appreciation for the contact, referrals to new clients, and big-fee tax planning projects. ...All from *regular* messages interesting enough to get *opened*.

**These emails make 52 touches per year.** *Successful touches. Done for you.*

**How much more will your clients appreciate you** if you reach out to them 52 times per year?

**How many more referrals will you get** if you're always at the top of their mind?

**Do you *really* have time to do it all on your own?**

## 5. **TaxCoach™ Mastermind Calls**

**Every month we host a 60-90 minute group Mastermind call.** We discuss specific tax, finance, and practice management strategies and detail them A-Z. We invite guest experts to offer "outside the box" thinking on managing a successful practice. We interview your peers to learn how they succeed. And each call is a "Mastermind Session" where *you* get to ask the group's help solving *your* marketing and management problems.

(We currently host calls the second Tuesday of every month at 4PM Eastern.)

**Can't make a call? No problem!** We record each call and post it for you to review on your own schedule. Past calls have included:

- **How to Become a Published Author in 30 Days – *During Tax Season***
- How to Get Paid – *Especially* in a Weak Economy
- **View From the IRS – With "Agent X"**
- Year-End Goal Setting
- **Election Results and How to Incorporate them Into Your Practice**
- Systems to Transform Your Practice Into a Business
- **How to Structure and Present Fees**

- Evaluating and Pursuing Target Markets
- **How to Get Booked on Radio and Television**
- Making Tax Planning a Year-Round Business
- **Developing Your Unique Selling Proposition**

## 6. Personal Coaching Calls

**Every month you get 30 minutes of personal one-on-one coaching.** This is where we manage the ongoing “Press Club” components (Referral Generation system, Online Marketing system, and Client Retention system), as well as your specific marketing and management challenges. You can schedule these calls yourself, at *your* convenience, using our online scheduling wizard.

**You may have 20 or more years experience in the business.** You may think you’ve seen it all, even done it all.

**But don’t discount the importance of having a “coach,”** even if you’re just honing your skills. Tiger Woods is the best golfer in the world. And he has a coach. Do you think that if *Tiger Woods* has a coach, you can use one too?

## 7. Free Admission to TaxCoach™ Events

**The “Press Club” program includes free admission to every event we host.** Our periodic “Spring Training” Boot Camp. Multi-day “PowerUser” Roundtables around the country. Special seminars and presentations. Even afternoons at the ball park.

**You won’t just be a client. You’ll be part of a community** of peers (but *not* immediate competitors) working to reach your business’s highest potential.

## 8. TaxCoach™ Membership

**Finally, the “Press Club” program includes your \$828 annual TaxCoach™ membership.** You’ll have ongoing access to all the TaxCoach™ planning and practice-development tools. Plus special tools reserved for our elite programs only!

## Can You Put A Price On Success?

**You’ve probably realized a program like this isn’t cheap.** And you’re right.

**“Press Club” is a comprehensive program, so I won’t apologize for charging fees that reflect it.**

**Of course, my own education and expertise hasn’t come cheap either.** I’ve invested tens of thousands of dollars, along with years of real-world trial and error, to gain my knowledge and experience. (I’ve actually invested more in my “Marketing Education” than I did to get my law degree!)

**I keep investing more and more in learning from the “Masters” every year – currently over \$1,000 per month, plus thousands more for special seminars and events.)**

So what would you expect to pay for that sort of expertise?

**Your investment in the “Press Club” program is just \$697 a month.** (Plus printing/postage).

Does \$697 sound like a lot? Well, for some people it might be.

**We see it as less than \$23 per day to “outsource” your toughest marketing headaches – without gobbling up your limited time, or saddling you with more staff headaches to manage.)**

**You see, the real issue isn’t the *cost*. It’s the *value*.**

**Traditional practice development programs give you tools then tell you to go to work.**

**But what if you don’t want to learn to fish? What if you *just want the fish*?**

**The TaxCoach™ “Press Club” program starts with the best tax-marketing tools in the business. Then we put them to work *for you*.**

**How much more could you bill with TaxCoach™ as your personal marketing strategist? \$20,000? \$50,000? \$100,000 or more?**

**How much time would you save every month by NOT worrying about your marketing? 5 hours? 10 hours? More?**

**So don’t just think of this as an investment in your business.**

**Think of it as an investment in your *life*.**

**As we said, “Press Club” is a territory-exclusive program. Your “base” territory is the zip code that includes your *primary* office location.**

**You can lock up as many additional zip codes as you like for just \$99/month each. Use them to protect your own territory. Or use them to “lock out” your closest competitors!)**

## **One in eight TaxCoach™ members are already profiting from our “Elite” programs!**

**Since you’ve invested in our TaxCoach™ system, you *may* qualify.** You’ll have the chance to join a growing number of few TaxCoach™ members from across the country who have the privilege of learning from, masterminding with, and being coached by me, Ed Lyon.

**Everyone who applies goes through a stringent review** so Keith and I can decide who qualifies and who doesn’t. In short, the group is **hand chosen**. It has to be that way so we can be sure we have the best group of professionals participating.

If you're chosen, I'll personally guide you on implementing revolutionary strategies to **TURBOCHARGE your income while working fewer hours every week!** Imagine the peace of mind that type of income and freedom will provide!

**What's the next step?**

**Fax the attached "Press Club" Enrollment Form to 513/297-0787.** (If you have specific questions, call Catherine at 513/321-2820 and ask her to schedule a call with me. Be sure to tell us you're interested in the "Press Club" program. That way, your call gets priority status.)

**But don't wait too long . . .**

**Your best clients and prospects are already nervous that Washington is going to hike their taxes.** Your tax-planning service will only get more valuable as their fear grows. That means you can't wait to enroll. You have to snap up your territory *now*, before your competition takes it away.

To Your Continued Success

A handwritten signature in black ink, appearing to read "Edward J. Lyon". The signature is fluid and cursive, with the first name "Edward" being the most prominent.

Ed Lyon

**P.S: The "Press Club" and "All Stars" programs are the *only* "Done for You" and coaching programs built around the TaxCoach™ tax-planning system. Don't miss this opportunity!**

# TaxCoach™ "Press Club" Application

<b>Office Use Only:</b> Approved: _____ Not Approved: _____
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Yes! I want "the fish!" I'm ready to outsource my referral generation and client retention chores, and I want to be the *only* tax professional in my area to enroll in your comprehensive, done-for-me "Press Club" program. I am applying for an exclusive territorial license to use the "Press Club" program in the following area:

**Primary Zip Code:** \_\_\_\_\_ **Additional Zip Codes:** \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
(Additional zip codes are \$99 each, billed monthly with your "Press Club" membership)

I understand that the "Press Club" program includes the following components:

1. Comprehensive Marketing Analysis
2. "Referral Machine" (client survey + referral tools)
3. Online Marketing and Automated Follow-up System (copywriting and autoresponder)
4. "Done for Me" Email Client Retention System
5. Monthly Webinar\*\*
6. Monthly Coaching Consultation\*\*
7. Free Admission to TaxCoach™ Events
8. TaxCoach Membership\*\*

- ✓ I understand that the fee for the "Press Club" program is \$697 per month, charged directly to my credit card.
- ✓ I understand that printing/postage for the survey is separate, and will be billed directly by the printer.

"Press Club" is a referral-based program best suited for established practices. Please help us make sure it's appropriate for you:

**Current Client Quality** — **Number of:** Personal Returns: \_\_\_\_\_ Business Returns: \_\_\_\_\_  
**Current Client Quality** — **Number of:** "A" Clients: \_\_\_\_\_ "B" Clients: \_\_\_\_\_ "C" Clients: \_\_\_\_\_

Do you currently work with a core group of ideal clients you could "clone" to grow your dream practice? Yes  No

Name: \_\_\_\_\_ Business Name: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Card # \_\_\_\_\_ Exp: \_\_\_\_\_

Card Billing Address: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

Signature\*: \_\_\_\_\_

\*By signing here, I agree to the following: If accepted, I will be charged \$697 per month by TaxCoach Software, LLC. I understand that printing and mailing costs will be billed separately by the printer of TaxCoach's choosing, and that I will be responsible for those charges.

I understand that I may cancel at any time by providing written notice no later than the 15<sup>th</sup> day of the month *before* the month I wish to cancel. In the event that I choose to cancel, TaxCoach may begin soliciting a successor for my territory immediately upon receiving notice of my intent to cancel.

If I am already an annual subscriber, TaxCoach will credit my remaining balance to the first month of my "Press Club" membership.

\*\*While my "Press Club" membership includes these components, I understand they are *not* part of the "territory-exclusivity" for the program.