

From the desk of Ed Lyon
TaxCoach Software, LLC



You've Mastered "Taxes." Now it's Time to Master "the Tax Business."

Dear TaxCoach Subscriber:

What's the secret to building a "big league" tax practice? How do you break through the seasonal grind, transforming your personal service practice into a "real" business that rewards you whether you show up or not?

It's really no secret at all. In fact, I'll give you the game plan here! Just like in baseball, there are four "bases":

First: Fill your pipeline with prospective clients. You need new clients each and every month to grow and thrive. (Are you meeting those goals?)

Second: Charge premium fees that reward you for the *value* you give clients – *not* the time you spend shuffling their paper. (Are you charging what you're *really* worth?)

Third: Give clients reasons to reward you more for new services, new value, and new solutions. (How much money are *you* leaving on the table?)

Home: Create *systems* to manage every step of your business, from marketing and sales through fulfillment and billing.

Sounds simple, right?

Well, it *should* be.

But

The real challenge that keeps 95% of your peers from reaching the success you deserve is *implementing* those steps. And that's what the TaxCoach "Spring Training 2008" is all about.

If you already know how to hit the ball – but you want to start hitting the *long* ball – then Keith and I invite you to spend a weekend with us at TaxCoach's first-ever national meeting.

Spring Training 2008 is more than just a "Boot Camp." It's a one-time chance to hone your skills in all four of these key positions: 1) generating clients, 2) securing premium fees, 3) maximizing total client revenue, and 4) systematizing your business.

Sneak Peek: The Spring Training “Playbook”

- **How to target the best clients for the practice *you* want to run**
- Easy-to-implement *systems* for filling your appointment book
- **Newest strategies for closing engagements, securing premium fees, avoiding the “billable hour,” and overcoming client resistance**
- New revenue sources for leveraging client relationships (*beyond* “financial planning”)
- **How to build a “referral machine”** and turn clients into champions, eager to refer friends, family, and colleagues

We’re talking a one-time opportunity to spend a full weekend working “on” your business, not “in” it. With some of the sharpest tax marketing minds inside and outside the business.

“Designated Hitters”

Keith and I will be “on stage” the entire event. (We’re not just throwing a “Tupperware party” to sell you stuff.) But we know we can’t be experts in everything. So we’ve arranged a lineup of “designated hitters” to “anchor” the agenda. (Tired of baseball references yet?) Here are just two:

Jon Keel is President of Improved Results, LLC. I met him back in 2001, when he was “making his bones” as the first authority on Internet pay-per-click advertising. (Those who recognize Dan Kennedy will be impressed to learn over half of his elite “Platinum” group have hired Jon.)

Keith and I spend \$500/month for one lunch with Jon, and after you hear him, you’ll agree that’s a bargain. Jon will discuss what’s working *now* to attract clients, online *and* off.

Mike Roth is President of Roth & Associates, Inc., a Sandler Sales Institute affiliate. Mike was my first sales coach, and he taught me many of the most powerful sales strategies I’ve incorporated into TaxCoach.

Mike will focus on selling strategies for *non-sales* professionals. He’ll give you a proven system for getting clients to *buy* so that you don’t have to *sell*. You’ll learn to control engagements without offending prospective clients, avoid the “unpaid consulting” that drains time and energy, quote fees with confidence, and maximize “face time” with prospects and clients.

Hot Seats

We’ll also be selecting two attendees for “hot seats.” If you’re selected, we’ll grill you all about your practice. Where are you are today? Where do you want to be tomorrow? Then, as a group, we’ll offer you our best strategies – right on the spot -- for getting you to your goals. You might squirm a bit from our “constructive criticism.” But you’ll sleep well, even if it stings, knowing you’ve got the whole group’s wisdom at your disposal.

Network with Your Colleagues

You'll also get to network with your TaxCoach subscribers from across the country. Fellow professionals, just like you, growing their practices and realizing their dreams. Pick their brains to learn what's really working, now, in dozens of practices.

We know that our "home team" is just part of the value Spring Training delivers. Don't be surprised if your most valuable insights come *outside* the seminar room.

No Payments 'Till After April 15

Keith and I struggled to price this event. We've heard subscribers tell us just one idea will pay for a lifetime's worth of our service. So what should we charge for two full days of concepts and strategies dedicated to multiplying your business?

The "base" tuition is \$1,797, ~~payable in three monthly installments of just \$599 each (starting 4/16, or whenever we receive your registration, and continuing on 5/16 and 6/16).~~ You probably spend more than that on tax-prep software – but software doesn't put clients in your office.

If you're already a TaxCoach subscriber, you can take a \$300 discount. That makes your tuition \$1,497, ~~payable in three easy installments of just \$499.~~

If you're a TaxCoach "All-Star," take *another* \$300 discount. That makes your tuition \$1,197, ~~payable in three easy installments of just \$399.~~

~~**If you register by April 7, you can take a \$99 "Early-Bird" Bribe off your first payment.**~~

~~**If you'd like to pay up front, take *another* \$99 "Bookkeeping" Bribe.**~~

Well, now that it's June, it's too late to get the early-registration and advance-payment discounts. But there's still help available – if you're deciding at the last minute to come and you'll have to drive to Cincinnati, we'll buy your first tank of gas! We'll credit you \$72 for 18 gallons of that crazy 4-bucks-a-gallon stuff (sorry if you're driving a Hummer!)

Together, these discounts and bribes can still knock almost \$700 off your tuition.

Oh, and you can bring your spouse, business partner, or employee at *no extra charge*. (Most boot camps charge hundreds more for this privilege – but since this is our first Spring Training, we'd rather not put that roadblock in your way.) More than one guest? Just \$99 each!

You can recover your tuition with just one new client. But don't think of just "recovering" it. Think of multiplying it, dozens of times over. We're so confident we guarantee it!

No-Weasel Guarantee

We've worked hard to assemble our agenda. But we know this is our first event, and we know you may be skeptical. So we're offering you not one, but two "No-Weasel" guarantees:

1. If you make it to dinner Saturday without learning at *least* one new strategy that you would swear to an IRS auditor will be worth 10 times your Spring Training tuition, you can leave the hotel, and WE'LL REFUND YOUR ENTIRE TUITION *PLUS* YOUR FIRST NIGHT'S HOTEL BILL, *IN FULL*.
2. If, at the end of Sunday afternoon, you feel you didn't get everything promised and more, you can meet with me, tell me why you're disappointed, and STILL GET A 100% REFUND, PLUS *BOTH* NIGHT'S HOTEL BILL, EVEN AFTER ATTENDING THE *ENTIRE* EVENT.

WARNING: ACT FAST TO MAKE THE CUT

Right now you're enjoying the bustle of "the season." Constant activity. Fat bank deposits! Growing your business may be the last thing on your mind.

But what happens when the season ends? With the economy teetering on the brink of recession? What will you do when your clients start feeling pinched? Where will you look when new clients grow scarce?

Keith and I have increased the size of the room at the conference facility. So there are still a few spaces available! **But the number of spots is still limited.** So act fast to make the cut!

DATES: June 20-22, 2008

(Friday: Evening Welcome Reception)
(Saturday: Training 8AM-6PM; Special "All-Stars Only" Banquet)
(Sunday: Training 9AM-2PM)

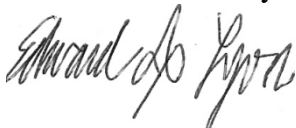
LOCATION: Cincinnati, Ohio
(Hotel Information Provided Upon Registration)

Here's how to take advantage of this special opportunity:

1. **Fax** the enclosed Order Form with credit card information to 513.297.0787
2. ~~Mail the Order Form with check or credit card information to:~~
3. **Call** TaxCoach Support at 888.591.6751

Are you serious about taking your practice to the next level? Then you owe it to yourself to attend the TaxCoach Spring Training 2008.

Do it now to secure your maximum discounts. Do it now to make 2008 your best year ever!



Ed Lyon

Count Me In!



Ed, I want to experience a weekend with my TaxCoach colleagues from across the country. Please accept my enrollment for the first-ever "TaxCoach Spring Training" 2008. I understand that I'm protected by your "No-Weasel" guarantees:

1. If I make it to dinner Saturday without learning at *least* one new strategy that I would swear to an IRS auditor will be worth 10 times my Spring Training tuition, I can elect to leave the hotel, and **YOU'LL REFUND MY ENTIRE TUITION PLUS MY FIRST NIGHT'S HOTEL BILL, IN FULL.**
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Tuition Option (Check One):

- Nonsubscriber: \$1,797 (full payment due with registration)
- TaxCoach Subscriber: \$1,497 (full payment due with registration)
- TaxCoach All-Star: \$1,197 (full payment due with registration)

Bribes and Extras (Check All That Apply):

- ~~I'm enrolling by April 7, 2008: Please credit my \$99 "Early Bird Bribe" against my first payment~~
- I'm paying in full with this application. ~~Please credit my \$99 "Advance Payment Bribe"~~
- Because it's a last-minute decision, ***I have to drive!*** Please credit me \$72 for my first tank of gas.
- I'm bringing ____ associates along: Add just \$99 each, and my first guest is free!

Total Tuition (after discounts and extra guests): \$ _____

Name: _____ Business Name: _____

Address: _____ City, State, Zip: _____

Phone: _____ Fax: _____ Email: _____

Card # _____ Exp: _____ Signature*: _____

Guest Names: 1: _____ 2: _____ 3: _____

1. **Fax** this Form with credit card information to 513.297.0787, or
- ~~2. Mail this Form with check or credit card info to 3416 Shaw Ave., Suite 5, Cincinnati OH 45208, or~~
3. **Call** TaxCoach Support at 888.591.6751

Cancellations received after May 21, 2008, will be applied as a credit towards future TaxCoach Software purchases.