


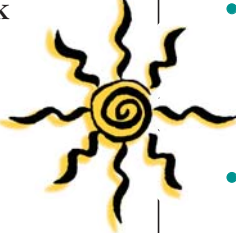




Marketing Calendar

Increase your profits all year

A year-round marketing program is the surest way to build the successful accounting firm you want. This Marketing Calendar will help you get started with your own marketing plan.

January	February	March
<ul style="list-style-type: none">• Send a direct mailing to attract new tax clients and a tax reminder mailing to current clients. Postcard mailings are easy, eye-catching, and economical.• Instruct your staff to make notes during tax season on any clients who may be candidates for additional services after tax season.• Encourage everyone in the firm to take a referral source to lunch. Let the guests know your firm would like to serve more clients and would appreciate their referrals. 	<ul style="list-style-type: none">• Give a tax talk to local groups. Most people are eager to learn about cutting taxes at this time of year.• Invite a local reporter or news editor to lunch; discuss the latest tax issues.• Review your website to make sure it includes upcoming tax dates and deadlines.	<ul style="list-style-type: none">• Send a welcome letter or card to new clients. Use this opportunity to point out your firm's other services.• Publish a display ad or information column in local newspapers and community newsletters to increase your firm's visibility.• When you give clients their completed tax return, include a brochure on tax planning and deadlines for the upcoming year. 
April	May	June
<ul style="list-style-type: none">• Don't appear too busy, or your current clients will think you don't want any new business or their referrals.• Survey your clients to find out the areas in which your firm might improve services.• Thank people for their business and their referrals. A colorful note or postcard is both thoughtful and easy to do. 	<ul style="list-style-type: none">• Send a mailing to local businesses. Include a cover letter and an informative brochure to show how your services can improve their business profits.• Host a "Tax Freedom Day" open house at your office. Invite clients and referral sources.• Take a realtor to lunch. Ask them to include one of your information brochures in their "welcome" packet for new homeowners.	<ul style="list-style-type: none">• Review your client notes from tax season; then contact clients so you can complete the additional work you identified while doing their tax returns.• Send clients and prospects a newsletter to encourage midyear tax planning - and let them know you're ready to assist them.• Encourage more referrals by asking local lawyers to display one of your brochures on estate planning in their reception areas.

July	August	September
<ul style="list-style-type: none"> • Review how incoming phone calls to your office are handled. Make any changes that you feel are necessary. • Invite local business owners to your office for a luncheon talk on improving cash flow, reducing business taxes, or other business topics. • Get a list of new hook-ups from your local utility companies (telephone, power, gas) and send a welcome letter; offer a free 30-minute consultation or review of three prior-year tax returns. 	<ul style="list-style-type: none"> • Take an objective look at your firm's stationery. If it doesn't create the image you want, make a change. • When you return to your office from vacation, walk through it as if seeing it for the first time. Change whatever makes a poor impression. • Take a prospective client to lunch each week this month. Follow up with a card and a free subscription to your client newsletter. 	<ul style="list-style-type: none"> • Ask local day care centers to display your brochures on financial topics parents would find interesting. • Invite prospective clients to your office for a "back-to-school" talk on tax-smart ways to save for college. • Take copies of your newsletter to restaurants, dental and medical offices - basically anywhere people have "waiting time."
October	November	December
 <ul style="list-style-type: none"> • Send clients and prospects a tax planning letter to promote year-end planning engagements. • Ask a local bank if you can "piggyback" your newsletter in their next mailing of monthly statements. • Remind all of your clients that you do more than just tax return preparation and planning. Your client newsletter, brochures, and website should contain articles about business and financial planning concerns. 	<ul style="list-style-type: none"> • Tell local clubs and organizations you're available to speak about tax planning. • Hold a brainstorming session with your entire staff on how to perform at top efficiency during tax season while still maintaining personalized service. • Start planning now for a January mailing to attract new tax clients. 	<ul style="list-style-type: none"> • Select someone in your office to be your tax season marketing watchdog - keeping brochures stocked in your reception area, monitoring your website to add fresh copy, etc. • Organize your mailing list for a tax reminder mailing in January to boost repeat business from last year's tax clients. • List your website with an online "community page" in your area. (Check with your local Chamber of Commerce or library.)



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