

## PREPARATION STAGE

**Business Goal:** Successfully prepare and file taxes for 50+ clients by April 2025, with a focus on accuracy and client satisfaction.

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10 REFRESHER TAX COURSE DEADLINE	11	12
13	14	15 PTIN DEADLINE	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

TO DO

GOALS

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WEEKLY OVERVIEW

WEEKLY TIME COMMITMENT: 6-8 HOURS (AFTER 5 PM OR WEEKENDS).

PRIMARY GOAL: COMPLETE ALL PREPARATORY TASKS TO BE READY FOR THE 2025 TAX SEASON.

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NOTES

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## **OCTOBER 2024: PREPARATION STAGE**

### **WEEKLY OVERVIEW**

- WEEKLY TIME COMMITMENT: 6-8 HOURS (IF YOU WORK: AFTER 5 PM OR WEEKENDS).
- PRIMARY GOAL: COMPLETE ALL PREPARATORY TASKS TO BE READY FOR THE 2025 TAX SEASON.

### **TASKS**

#### **1. GET PTIN (PREPARER TAX IDENTIFICATION NUMBER)**

- DEADLINE: OCTOBER 15, 2024
- STEPS:
  - VISIT IRS PTIN PAGE.
  - FILL OUT ONLINE APPLICATION.
  - PAY FEE.

#### **2. REGISTER FOR REFRESHER TAX COURSE (CONTINUING EDUCATION)**

- DEADLINE: OCTOBER 10, 2024
- RESEARCH ONLINE COURSES (CONSIDER IRS-APPROVED PROVIDERS).
- COURSE DURATION: 10-12 HOURS.
- PLAN TO COMPLETE THE COURSE IN OCTOBER.
- STATUS: [TO DO/IN PROGRESS/COMPLETED]

#### **3. REVIEW CHANGES IN TAX LAWS**

- ONGOING TASK.
- SUBSCRIBE TO NEWSLETTERS OR FORUMS (IRS UPDATES, PROFESSIONAL TAX PREPARER GROUPS).
- ALLOCATE 1 HOUR PER WEEK TO STAY INFORMED.

#### **4. BUSINESS SETUP**

- ENSURE BUSINESS BANK ACCOUNT, INVOICING SYSTEM (E.G., QUICKBOOKS), AND CLIENT MANAGEMENT TOOLS ARE READY.

# MARKETING & SOFTWARE SETUP

**Business Goal:** Successfully prepare and file taxes for 50+ clients by April 2025, with a focus on accuracy and client satisfaction.

SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7 CHOOSE TAX SOFTWARE	8	9
10	11	12	13	14	15 WORK ON CLIENT SET UP	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

**TO DO**

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**GOALS**

WEEKLY OVERVIEW

- WEEKLY TIME COMMITMENT: 5-7 HOURS.
- PRIMARY GOAL: START MARKETING EFFORTS AND FINALIZE TOOLS FOR TAX PREPARATION.

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**NOTES**

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# **NOVEMBER 2024: MARKETING & SOFTWARE SETUP**

## **WEEKLY OVERVIEW**

- WEEKLY TIME COMMITMENT: 5-7 HOURS.
- PRIMARY GOAL: START MARKETING EFFORTS AND FINALIZE TOOLS FOR TAX PREPARATION.

## **TASKS**

### **1. CHOOSE TAX PREPARATION SOFTWARE**

- DEADLINE: NOVEMBER 7, 2024
- RESEARCH TAX SOFTWARE (FEEL FREE TO ASK ME ABOUT THE SOFTWARE I USE).
- PURCHASE AND SET UP.
- FAMILIARIZE YOURSELF WITH THE SOFTWARE FEATURES.

### **2. SET UP CLIENT PORTAL FOR DOCUMENT COLLECTION**

- DEADLINE: NOVEMBER 15, 2024
- USE SECURE CLIENT PORTALS LIKE GOOGLE WORKSPACE OR DEDICATED TAX SOFTWARE TOOLS. (I WILL DISCUSS MORE ABOUT THESE RESOURCES IN AN UPCOMING ZOOM TRAINING CLASS, STAY TUNED FOR MORE INFO).

### **3. CREATE MARKETING MATERIALS**

- DEVELOP WEBSITE (OR UPDATE IF ALREADY EXISTING).
- CREATE SOCIAL MEDIA CONTENT TO START ADVERTISING TAX SERVICES BY MID-DECEMBER.
- CREATE A LIST OF CONTENT IDEAS FOR SOCIAL MEDIA, FOR EXAMPLE: "TAX PREP TIPS FOR EARLY BIRD FILERS".

### **4. EMAIL MARKETING SETUP**

- BUILD AN EMAIL LIST OF POTENTIAL CLIENTS.
- SET UP MAILCHIMP OR OTHER EMAIL MARKETING TOOLS.
- DRAFT EMAIL TEMPLATES FOR NEW CLIENTS, FOLLOW-UPS, AND TAX REMINDERS.

## CLIENT OUTREACH & CONTINUED EDUCATION

**Business Goal:** Successfully prepare and file taxes for 50+ clients by April 2025, with a focus on accuracy and client satisfaction.

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31 FINISH CONTINUED EDUCATION				

### TO DO

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### GOALS

WEEKLY OVERVIEW

- WEEKLY TIME COMMITMENT: 5-6 HOURS.
- PRIMARY GOAL: BEGIN OUTREACH TO POTENTIAL CLIENTS AND SOLIDIFY TAX KNOWLEDGE.

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### NOTES

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# **DECEMBER 2024: CLIENT OUTREACH & CONTINUED EDUCATION**

## **WEEKLY OVERVIEW**

- WEEKLY TIME COMMITMENT: 5-6 HOURS.
- PRIMARY GOAL: BEGIN OUTREACH TO POTENTIAL CLIENTS AND SOLIDIFY TAX KNOWLEDGE.

## **TASKS**

### **1. START CLIENT OUTREACH**

- BEGIN CONTACTING PREVIOUS CLIENTS (IF APPLICABLE).
- SEND OUT INTRODUCTORY EMAILS TO NEW POTENTIAL CLIENTS.
- POST WEEKLY ON SOCIAL MEDIA TO BUILD BRAND AWARENESS (E.G., INSTAGRAM, FACEBOOK).

### **2. COMPLETE TAX COURSE & EARN CPE CREDITS**

- DEADLINE: DECEMBER 31, 2024
- ENSURE ALL REQUIRED CREDITS ARE COMPLETED AND REPORTED TO THE IRS.

### **3. PLAN CLIENT INTAKE PROCESS**

- DEVELOP AN INTAKE FORM FOR GATHERING CLIENT INFORMATION.
- AUTOMATE DOCUMENT REQUESTS USING A CHECKLIST (E.G., W-2'S, 1099S, ETC.).

### **4. REVIEW YOUR COMPETITORS**

- RESEARCH HOW OTHER VIRTUAL TAX PREPARERS ARE MARKETING THEIR SERVICES.
- DEVELOP PRICING STRUCTURE BASED ON COMPETITORS AND YOUR VALUE PROPOSITION.

**TAX SEASON LAUNCH**

**Business Goal: Successfully prepare and file taxes for 50+ clients by April 2025, with a focus on accuracy and client satisfaction.**

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5 ANNOUNCE YOUR SERVICES	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**TO DO**

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**GOALS**

WEEKLY OVERVIEW

- WEEKLY TIME COMMITMENT: 10-15 HOURS (MOSTLY EVENINGS AND WEEKENDS).
- PRIMARY GOAL: OFFICIALLY LAUNCH SERVICES AND ONBOARD FIRST CLIENTS.

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**NOTES**

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# **JANUARY 2025: TAX SEASON LAUNCH**

## **WEEKLY OVERVIEW**

- WEEKLY TIME COMMITMENT: 10-15 HOURS (MOSTLY EVENINGS AND WEEKENDS).
- PRIMARY GOAL: OFFICIALLY LAUNCH SERVICES AND ONBOARD FIRST CLIENTS.

## **TASKS**

### **1. ANNOUNCE YOUR 2025 TAX SERVICES**

- DEADLINE: JANUARY 5, 2025
- POST ON SOCIAL MEDIA AND SEND EMAILS ANNOUNCING THE OPENING OF TAX SERVICES.
- OFFER EARLY-BIRD PROMOTIONS FOR CLIENTS WHO BOOK IN JANUARY.

### **2. CLIENT MEETINGS & DOCUMENT COLLECTION**

- START SCHEDULING CLIENT CONSULTATIONS AFTER 5 PM OR ON WEEKENDS.
- COLLECT AND ORGANIZE ALL NECESSARY TAX DOCUMENTS.

### **3. TRACK WORKFLOW WITH CRM**

- USE A CLIENT RELATIONSHIP MANAGEMENT (CRM) TOOL TO TRACK CLIENTS, DOCUMENTS, AND DEADLINES.
- SET UP AUTOMATED REMINDERS FOR KEY TAX DATES.

### **4. PREPARE EARLY RETURNS**

- START PREPARING TAX RETURNS FOR CLIENTS WHO SUBMIT DOCUMENTS EARLY.
- AIM TO COMPLETE EARLY FILINGS BY THE END OF JANUARY FOR CLIENTS WHO QUALIFY FOR EARLY FILING.



MONTH

*February*

# 2025 TAX SEASON *Planner*

## PEAK TAX SEASON

**Business Goal: Successfully prepare and file taxes for 50+ clients by April 2025, with a focus on accuracy and client satisfaction.**

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15 IRS DEADLINE	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

### TO DO

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### GOALS

WEEKLY OVERVIEW

- WEEKLY TIME COMMITMENT: 15-20 HOURS (AFTER 5 PM AND WEEKENDS).
- PRIMARY GOAL: COMPLETE CLIENT RETURNS EFFICIENTLY AND CONTINUE MARKETING FOR LAST-MINUTE FILERS

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### NOTES

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## **FEBRUARY - APRIL 2025: PEAK TAX SEASON**

### **WEEKLY OVERVIEW**

- WEEKLY TIME COMMITMENT: 15-20 HOURS (AFTER 5 PM AND WEEKENDS).
- PRIMARY GOAL: COMPLETE CLIENT RETURNS EFFICIENTLY AND CONTINUE MARKETING FOR LAST-MINUTE FILERS.

### **TASKS**

#### **1. COMPLETE CLIENT TAX FILINGS**

- PRIORITIZE EARLY SUBMISSIONS TO REDUCE LAST-MINUTE WORKLOAD.
- DOUBLE-CHECK FOR ERRORS AND ENSURE ALL RETURNS ARE FILED ON TIME.

#### **2. LAST-MINUTE CLIENT INTAKE**

- CONTINUE MARKETING TO ATTRACT CLIENTS UP UNTIL APRIL 15.
- OFFER EXPEDITED SERVICES FOR LATE CLIENTS (CONSIDER HIGHER FEES FOR RUSH FILINGS).

#### **3. TAX DEADLINES**

- ENSURE ALL CLIENT RETURNS ARE FILED BY THE IRS DEADLINE (APRIL 15).
- FILE FOR EXTENSIONS WHERE NECESSARY.