

Q1

January - March

— Jumpstart your business.

The start of the year is crucial for your practice, and your clients. Explore the benefits of emails to connect with your clients and educate them early on.

Ideas to get started:

- Take the time to organize client lists and contacts by industry and type of business to set up automatic reminders for specific statements or deadlines.
- As clients prepare for the new year, reach out with insights on the latest changes in federal and state tax laws or tips on financial records requirements.
- Educate your self-employed clients with a monthly email series about the importance of bookkeeping and share more about tax payment schedules.
- Reward existing, long-standing clients by sending a thank-you email with a small discount for any referrals they send.
- Send reminders to your corporate client list about upcoming tax deadlines in March and incentivize early-bird tax filers by providing a discount on their filing.

Q2

April - June

— Embrace spring with fresh strategies.

Use email communications to maintain relationships with your clients and share expert financial advice for the next quarter.

Ideas to get started:

- Use your phone to create a short video answering clients' last-minute tax-related FAQs and send it via email ahead of Tax Day for individuals.
- Automate your introductory meetings. Mailchimp can automatically send new clients a welcome email with a link to schedule a meeting and what to bring after they sign up on your website.
- Schedule an email after the new client meeting to ask for feedback on their experience and provide next steps for setting up with your firm.
- Send reminder emails to existing clients with upcoming appointments and notes on what to bring.
- Share tips for staying organized and maintaining financial statements.
- Encourage contacts on your email list to set financial goals for the summer and provide advice on budgeting for upcoming expenses.

Q3

July - September

— Keep your cash flow sizzling.

Turn up the heat on your next newsletter with specialized, one-on-one services to help clients rethink their summer strategy.

Ideas to get started:

- Give advice on deducting expenses for summer vacations, rental properties, and home offices for remote workers.
- Offer existing clients one-on-one consultations to restructure their businesses or streamline their processes to continue growing.
- Automate targeted reminders for pass-through businesses that have requested a 6-month extension for filing Form 1065 or Form 1120 and provide a Schedule K-1 to all partners or shareholders.
- Ask your current clients for a customer testimonial to share on social media and your website—a personal testimonial generates new leads.
- Reach out to existing clients to get back on their radar and highlight your new product offerings.

Q4

October - December

— Warm up to those cold leads.

Re-engage clients by sending holiday-themed newsletters with year-end financial planning services and helpful budgeting content.

Ideas to get started:

- Send out an end-of-year checklist to educate clients about maximizing contributions to retirement plans, including upcoming deadlines and contribution limits for various account types.
- Got an FSA? Alert clients to deadlines for flexible spending accounts and tips on how to spend the last of it before December 31.
- With holiday travel and gifting, share a checklist for staying on budget and open up scheduling for clients with questions.
- Haven't heard from specific clients in the last year? Target your email list to clients that did not return for services in the last year and send them a personalized offer to re-engage them.
- With your holiday message, prompt your clients to schedule check-ins for the new year and thank them for their business this year.