Value Levels | **Phone Script**

The goal of this script is to not “sell” anything and to NOT try and convert every person! Only a % of clients will match your ideal, so you want to identify those people than not waste time with those who don’t.

Client Question 1 | "Hi, how much do you charge for a tax return?"

Answer 1 | “Your price is based on your unique goals for working together, so to give you an accurate range, we would need to schedule a Free, 15-minute Discovery Call. During the call, we can learn a little bit more about you & and your business, and verify if we’re the best fit for what you want to achieve.”

Client Question 2 | "Oh ok, that sounds reasonable...can you tell me a little more about how that works?"

Answer 2 | I'd love to! We follow a simple 3-step process:

1) We start by understanding what you want most from your business & personal financial life in the next 12 months.
2) Next, we put together a list of action items for how we could achieve those specific results as quickly as possible and what the costs would be for helping with your tax/accounting/payroll needs.
3) Then we would review a Proposal together and if everything makes sense we start our work!

Client Question 3 | "Wow that sounds great - how much do you usually charge?

Answer 3 | "Well for most clients that start around ***[insert individual starting price]*** per month for individuals & from ***[insert business starting price]*** per month for businesses.
Pricing is based on your specific situation. We purposefully choose to only work with select clients who we know will receive a ton of value from our process.

Client Question 4 | That sounds really interesting. What's next & how would I know what my specific price would be?

Answer 4 | “We just need to schedule a date and time & send you some important information to review before the call...can I ask you a few basic questions and then we can get you on our calendar?”