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The Perfect Pricing Script©

The easiest way to "talk about fees" with any client.

✔ Eliminate anxiety when talking about your fees.

✔ Bring up fees with long-time clients without losing them.

✔ Get paid what you're worth in every engagement.

The Perfect Pricing Script.

Hi, I'm Will Hamilton, Founder of SmartPath.co

We help small **tax & accounting firms** improve their pricing so they can increase their margins and focus on work they enjoy.

This Perfect Pricing Script© will show you exactly how to **structure your fee conversation** with any tax or accounting client.

1,000's Tax firms across the US are already using this process to **stop feeling anxious** whenever it's time to talk to clients about fees.

The great thing is, you can use this template with **new and existing clients!**

As soon as you start using this script:

- ✔ You'll stop feeling anxious or guilty when it's time to discuss your fee.

- ✔ You'll increase your margins so you can pay yourself what you deserve.

- ✔ You'll position yourself as a trusted advisor so clients will be happy to pay.

Let's dive in!

William Hamilton

How to Use This Script

The **Perfect Pricing Script**© follows a proven structure that keeps you and the client on the same side of the table and ensures they always feel like they have a choice in the process.

So we now have two ways we can work with clients:

> *Giving clients a choice is the #1 strategy that will keep them from feeling like they're being sold to and keep you from feeling stressed.*

Here are the critical elements of the script:

1. Start with WHY

The first step in the Perfect Pricing Script© is to say out loud WHY someone would want to pay your fees and create context around why you have structured your fees the way you have.

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2. Create Contrast

Once you have established why you're talking about fees and you and the client are on the same side of the table, you need to create contrast between your different levels of engagement.

3. Describe Your Pricing Process

Give the client clarity for exactly how you can both move forward and discover the right price for them based on their unique goals.

4. Make it Personal

Every person you talk to about your pricing is a human being that wants to make progress in their life. Focus on the human element, not the technical details.

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Perfect Pricing Script – Full©

"[Client Name] Obviously, a lot has changed in the world recently.

So we now have two ways we can work with clients:

✅ We have the traditional option where we speak once a year during tax time and you're hiring us to file your tax return (and/or keep your books up to date).

    ✅ In this option, we have to bill you separately for help with things outside of your tax return because we're just engaged to report what has already happened. We can only impact your outcomes in limited ways because the year has already passed by the time we file your return.

    ✅ The second, new option, is where we work together year-round to:

        A. Ensure you're paying the least amount of tax possible (this can only happen through proactive tax strategies at specific times of the year).

        B. Increase your personal/business cash flow as much as possible.

        C. Intelligently grow your personal/business balance sheet so you're as prepared for the future as you can be.

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✅ This year-round option includes help for any strategies or threats we'll want to address now + all of the compliance work we do for you normally.

✅ We created this second option because we want to help clients more. For clients that can benefit from this level of help, the traditional approach just doesn't allow us the time we need to deliver the best possible outcomes in today's environment. Changes are happening too quickly and a "reactive" approach no longer works.

✅ After thinking about your specific situation, you'd be the perfect candidate for our year-round option.

✅ This would be one simple monthly fee that covers everything we would need to work together and ensures you're getting the best possible results now and for years to come (and we wouldn't have to charge you every time you needed help with something).

✅ If you're interested, we can schedule a Discovery Call to talk more...

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Perfect Pricing Script – Short©

With the economy being so wacky right now, many of our clients:

✅ Are looking for more advanced ways to lower their tax bill.

✅ Want to keep a closer eye on their monthly cash coming in and out.

✅ Or just want to see how they're doing and create a plan to increase savings.

✅ So we started putting aside some time outside of tax season where we can chat about anything you want to make progress on this year and see if we can help.

✅ The call is completely free. If we identify some things that are important to you and we can help, we can discuss some options for what that help could look like.

✅ During the call we'll help you define & document your top 2 or 3 priorities this year so it's guaranteed to be worth the time.

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So I would love to get you on the calendar before all the spots fill up...is now a bad time to schedule a chat?

Notes

Next Steps

Congratulations on taking the first step in getting paid what you deserve!

When you use this script to setup Discovery calls with your clients, you will immediately see:

- ✔ *Clients are happier to pay your fees.*
- ✔ *Your margins are higher for every client you work with.*

If you want to automate your pricing and Fee Schedule, we can help.

Schedule a demo of the SmartPath Engage Software.

- ✔ Our pricing engine recommends the perfect price for any tax client in seconds.
- ✔ Send clients a Magic Link to see and select the services they want.
- ✔ Gather all the info you need to onboard clients 3x faster.
- ✔ Automatically manage scope and change requests.

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