



Take Back Your Time During
Busy Season:

Time Management Strategies

with *Loren Fogelman*

4
60
40

More Hours

Better Results

≠

Poll Question

Peak tax season weekly hours?

- ✓ Under 50
- ✓ 50–59
- ✓ 60–69
- ✓ 70+

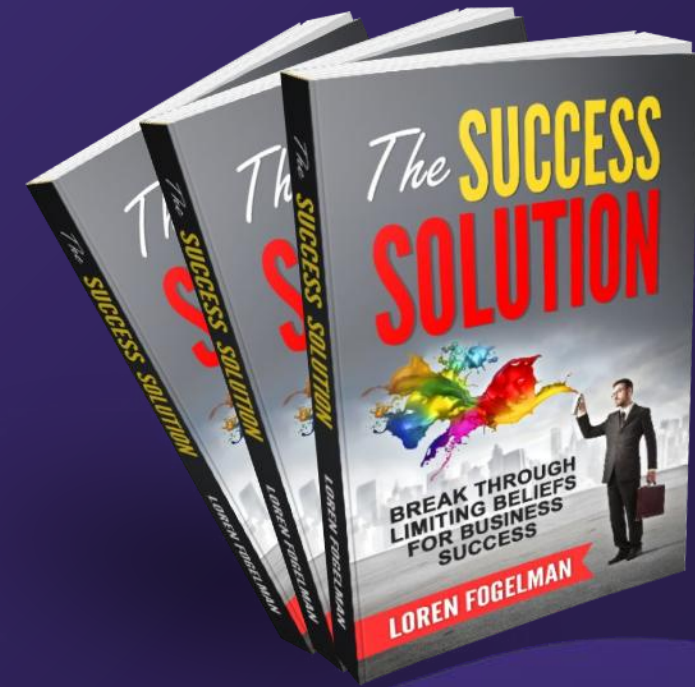
Are You...



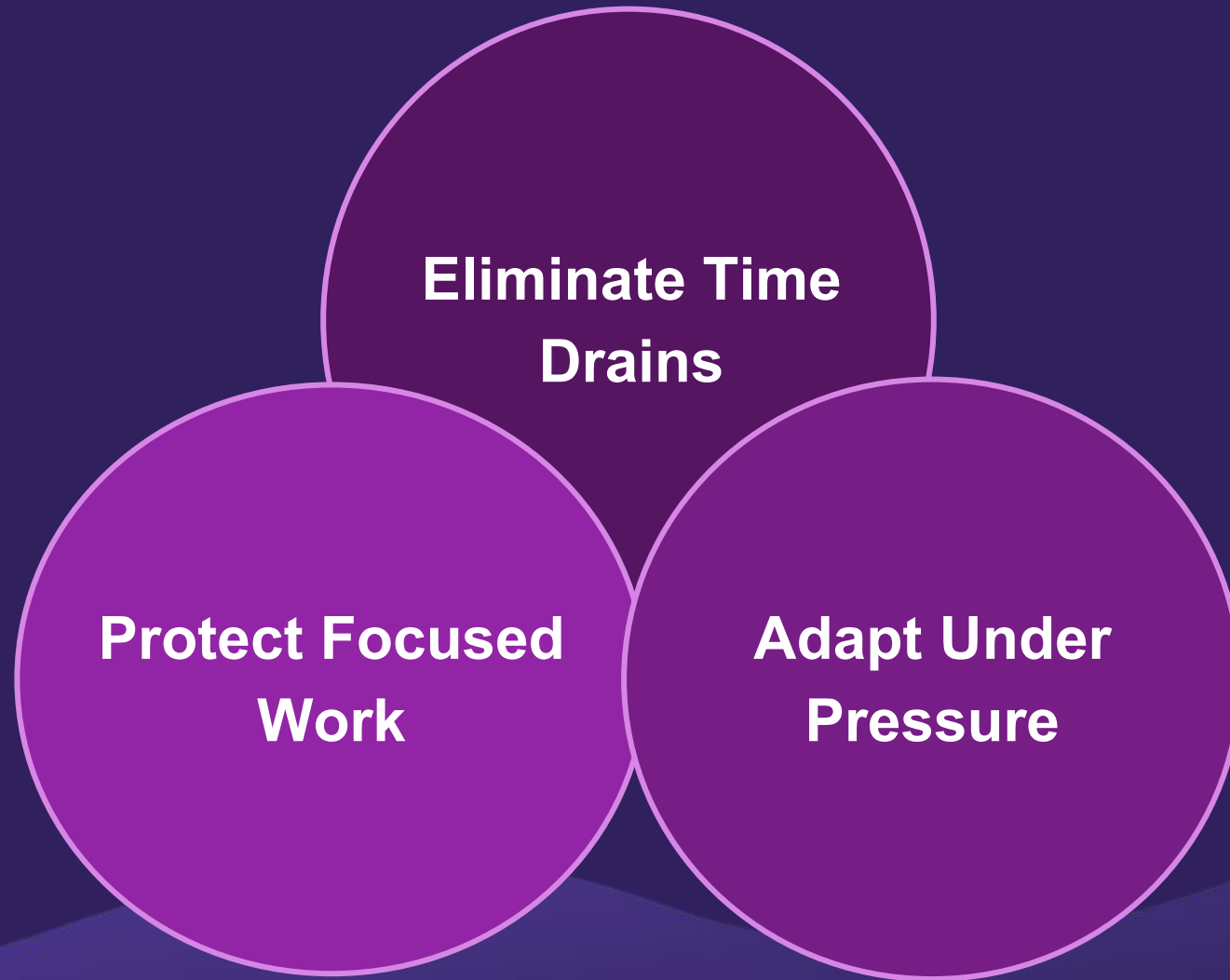


Steven Fogelman, Co-Host

Top 22 Business Coaches List by HubSpot



What You'll **Learn Today**





Let's Get **Started**



Earn More without Working More

1 High Quality Clients

2 Define Your System

3 Establish Boundaries

4 Value Pricing

5 Client Attractive Solutions

Poll Question

What interrupts your workflow most often?

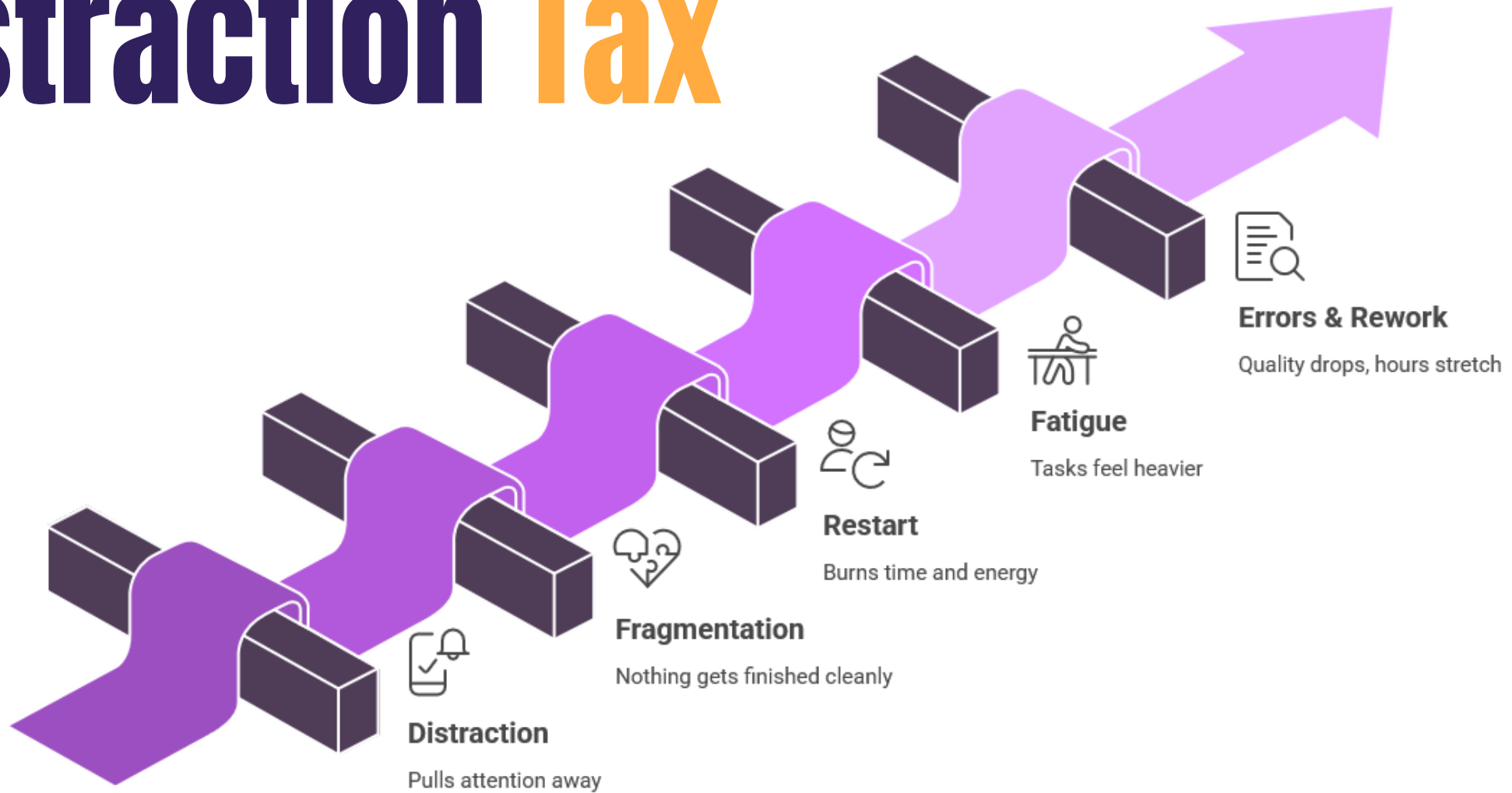
- ✓ **Client emails or calls**
- ✓ **Missing documents**
- ✓ **Team interruptions**
- ✓ **Task switching**

23+ Minutes

U. of California, Irvine

BSS

Distraction Tax



Starts and Stops

- ① Intention to Action
- ② Your best hours
- ③ Block time
- ④ ON your business



Limit Interruptions

- 1 List top 3 distractions
- 2 Which drains focus most
- 3 Create a boundary
- 4 Communicate it



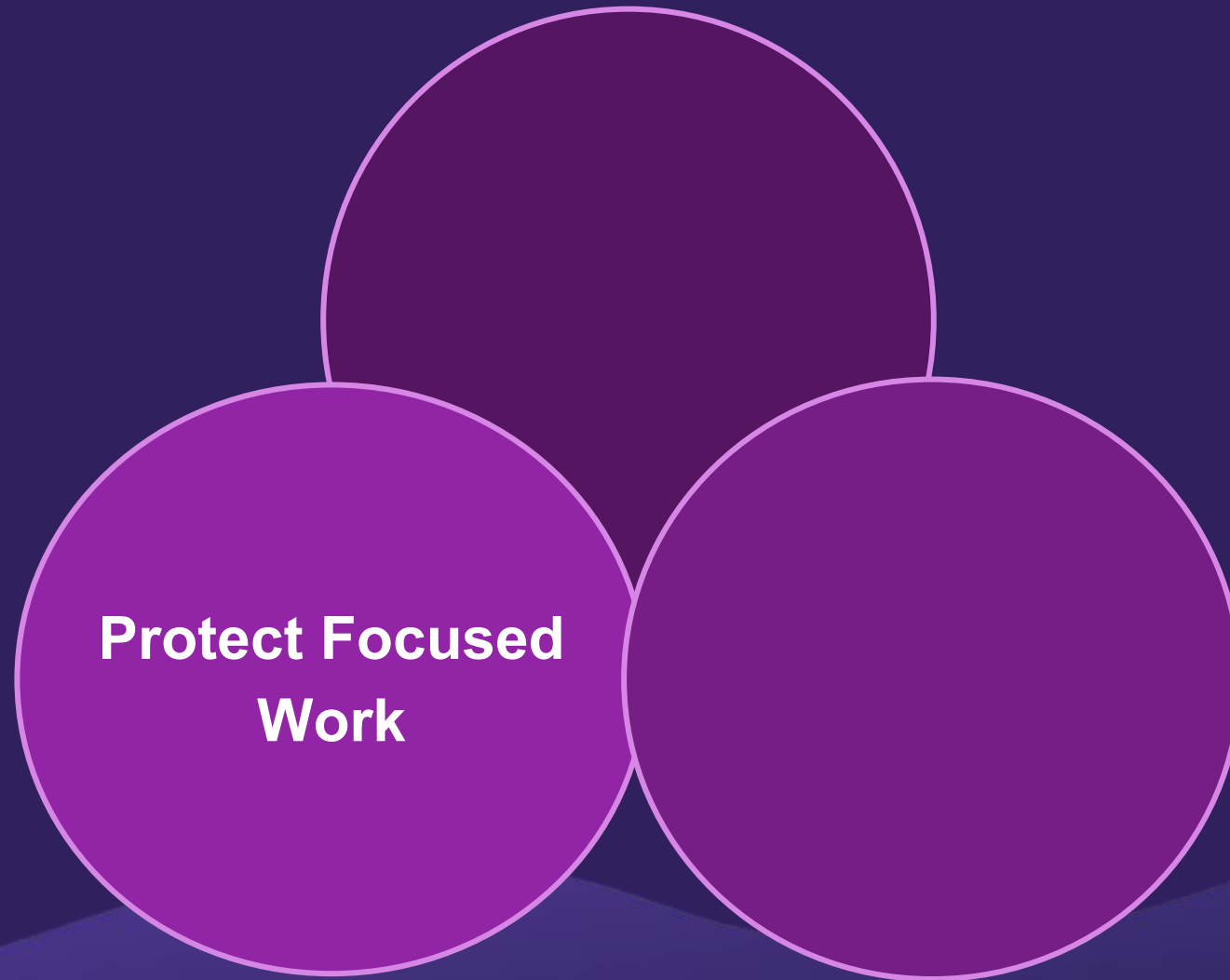


**I thought I was busy
with volume, but
interruptions were
the real drain.**

Karyn Anderson
Total Sum



What's Next

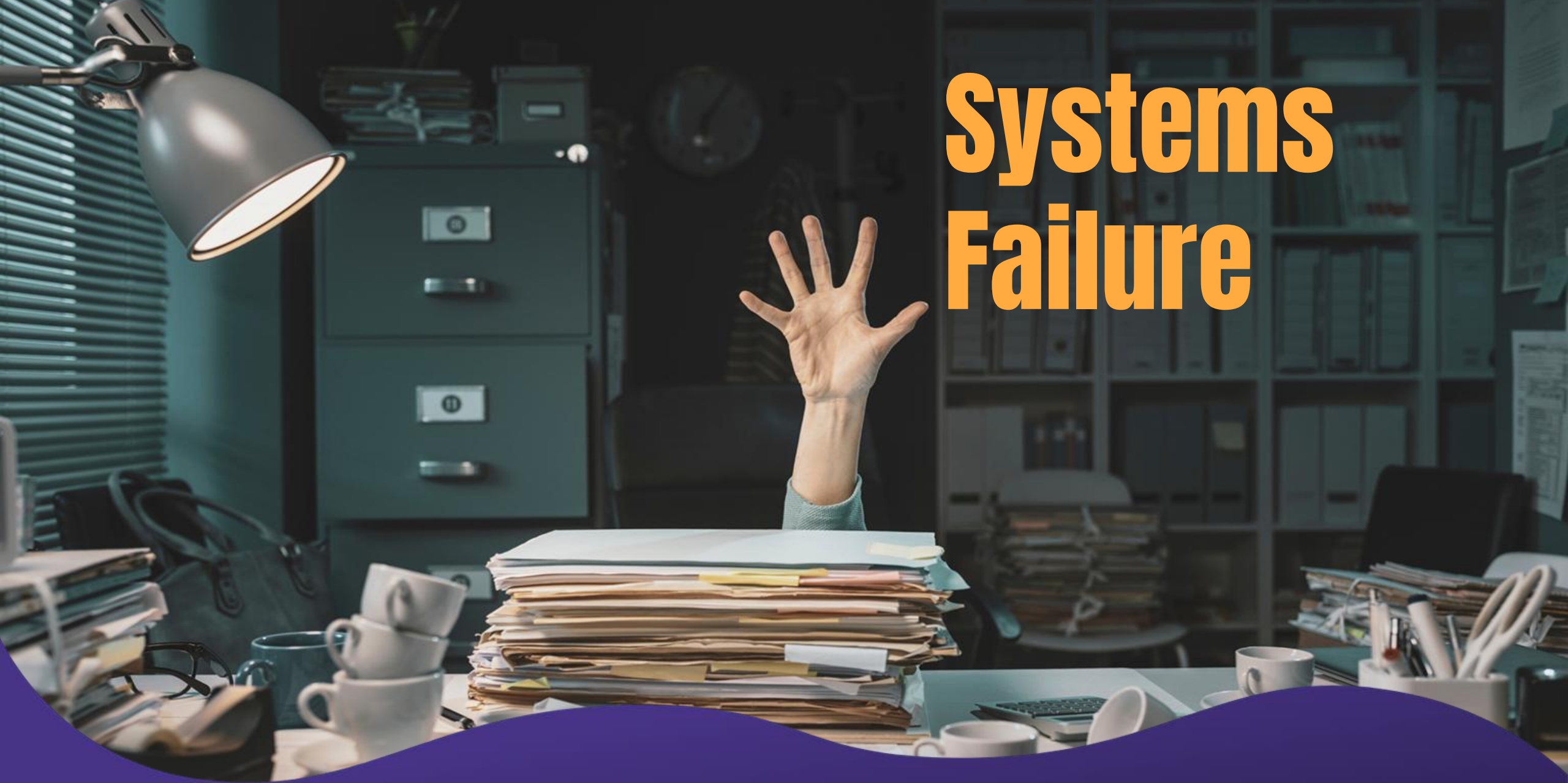


Poll Question

Who controls tax return readiness?

- ✓ **Client requests it**
- ✓ **I decide when**
- ✓ **First available does it**
- ✓ **Admin ensures readiness**

Systems Failure





5 Critical Boundaries

1 Response Time Block

4 Scope Creep

2 Extra Questions

5 Non-Essential Meetings

3 Late Documents

Client-Centered Scripts

- 1 **Response time** I answer questions during office hours. Anything else goes to my admin.
- 2 **Extra questions** Let's discuss that question during our scheduled check-in
- 3 **Late documents** We'll immediately start the project once everything arrives.
- 4 **Scope creep** That request is outside the agreed scope so let's handle it separately.
- 5 **Meetings and interruptions** We can meet at a later date or my admin can handle it now.

No longer gives tax
advice away for free
and **my revenue has
doubled.**

David Boatswain
Boatswain CPA PLLC



Features	Diamond	Gold	Silver
Federal Tax Return - Current Year	✓	✓	✓
Tax Extensions (Federal and State)	✓	✓	✓
Tax Review Meeting	Zoom / In - person	Zoom - 30 min	Zoom - 15 min
Schedule C	3	Primary	
Schedule E	6	2	
Financial / Tax Literacy	✓	✓	
Withholding Review	✓	✓	
Quarterly Safe Harbor Estimates	✓	✓	
Quarterly Tax Projections	✓	✓	
Year-End Tax Projection	✓	✓	
State Notices Review	2		



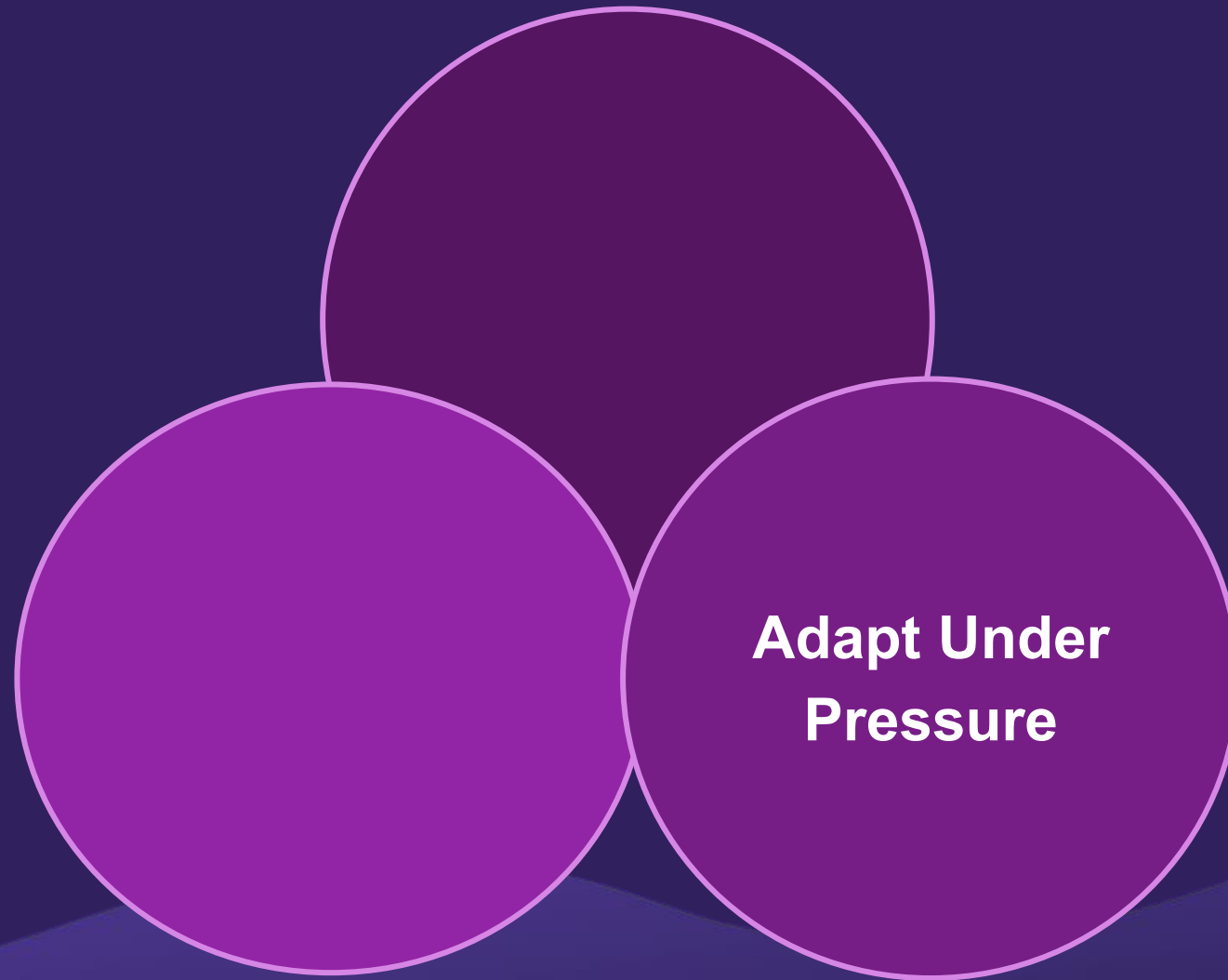
Tax Season Guide

Scan code for the FREE Resource



BusinessSuccessSolution.com/readiness

Moving Forward



Poll Question

Which best describes you?

- ✓ **People-Pleaser - says yes too often**
- ✓ **Bottleneck - it's difficult to delegate tasks**
- ✓ **Over-Worker - constantly works late**
- ✓ **Flexible Follower - reacts, not plans**



Deadline + Surge Pricing

- 1 Define normal turnaround times
- 2 Decide on cutoff dates
- 3 Differentiate late requests and adjust pricing
- 4 Disclose cutoff dates and pricing to clients and team
- 5 Don't start work until everything is ready



Tax Deadline Messaging

01

Cutoff Announcement

Late submissions can still meet the IRS deadline via expedited service. This ensures every return gets proper attention.

02

Late Submission / Surge Fee

Since it's past the cut off, here's the fee for expedited service or we can put it on extension. What option works best for you?

03

Quick Question / Boundary

We want to make sure your return gets our full attention. Work starts once all documents are received.

1

Identify one bottleneck

2

Decide the process

3

Assign a gatekeeper

In 90 days, increased fees
by **60% and 90%** of clients
moved into pre-paid tax
advisory packages.

Karmen Hoxie, CPA



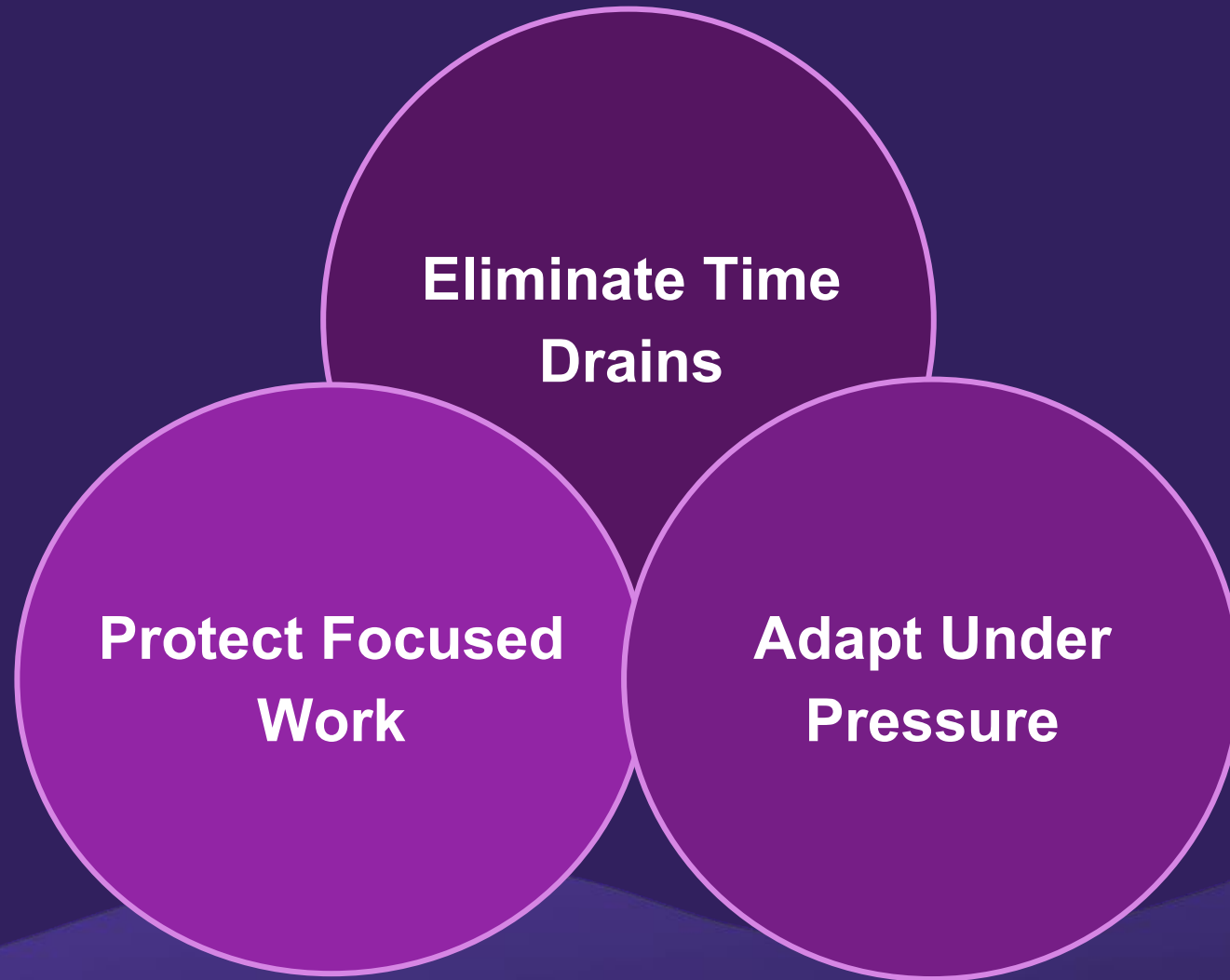
Features	Diamond	Gold	Silver
Professionally Prepared Corp Return - Current Year	✓	✓	✓
Personal Tax Prep - Current Year	✓	✓	✓
Audit Protection for Personal	✓	✓	✓
Reviewed by a CPA	✓	✓	✓
Simple Return / Standard Forms: W-2, 1099's	✓	✓	✓
IRS, State and Local Notices Review	✓	✓	✓
IRS, State and Local Resolve	2	1	
Schedule A Itemizing	✓	✓	
Schedule C Self-Employment	✓	✓	
Schedule D - Capital Gains	✓	✓	
Schedule E RE Rentals / K1	✓	✓	
Standard Forms			

Poll Question

How interested are you in talking with Loren about taking charge of your firm?

- ✓ I'd like to schedule a 15 min consult with Loren
- ✓ This looks interesting. I'd like to find out more
- ✓ Not interested at this stage

What We **Covered** Today



Complimentary Path to Profits Strategy Session

<https://BusinessSuccessSolution.com/letstalk/>

Scan code to get started



Loren Fogelman

Price and Profit Coach

