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VOICE OF THE EDITOR

Finding and Keeping Clients

Today's articles offer lots of suggestions about ways you can build and maintain your practice. In **What You Need to Know Before Recommending a Financial Advisor**, you'll learn how obtaining certification in financial planning or partnering with a financial advisor can bring new clients in your door. And, if you think now – in the midst of tax season – isn't the best time to recruit new clients, be sure to read **Tax Season May Be Opportune Time to Market Tax Preparation Services**. Finally, blogger and marketing expert Allan S. Boress has some great advice about **upgrading your firm's image**.



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PRACTICE HEADLINES

➔ **What You Need to Know Before Recommending a Financial Advisor**

Clients who already trust their accountant's expertise with financial matters may ask for advice regarding financial planning. Being able to offer sound advice for clients will require an accountant to gain certification, designation as a financial advisor, or to partner with someone who can be entrusted to serve clients well in this area.



➔ **Tax Season May Be Opportune Time to Market Tax Preparation Services**

With less than a month left to go until the April 15 tax deadline, most tax return preparers are up to their elbows in work. Nevertheless, it might be an opportune time to land some new clients, since people are thinking about their taxes and wondering if they might pay less next year if they find a qualified tax preparer now.



➔ **The Silent Deal Killer: The Image You Project**

"Image is the silent deal-killer," says best-selling author Wendy Lyn Phillips in her workshops and speaking engagements. How many deals (sales) has your firm lost because you and others weren't putting forth an image congruent with the kind of client and business you wanted?



THIS WEEK ON ACCOUNTINGWEB

- ➔ **Larry Kammerer, CPA, at Moss Adams LLP**, and **Amber Hurst, EA, at Ganze & Company**, talk with us about how their firms are using mobile technology for money management.
- ➔ **Strickler & Prieto, LLP Managing Partner Phillip Strickler** and **Senior Tax Accountant Laura Lizardo** share their thoughts on the benefits of creating a fun and supportive work environment.
- ➔ **Jody Padar, CPA, director of operations for EcoTaxFile.com**, explains how this innovative, new company combines tax preparation services with personal energy-consumption audits.
- ➔ **Xero President of US Operations Jamie Sutherland** talks with AccountingWEB about the recent hire of Stuart McLean, formerly with Google.



Today's workplace fitness exercise focuses on the thigh and gluteal muscles.

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