

# How Top Firm Owners Retire Early & Easily Sell Their Firms for Maximum Value

Michelle Weinstein

# Who is this for?

**This is for any accountant, CPA, EA, Tax Attorney, Bookkeeper, or Fractional CFO that owns a firm and wants a CLEAR PATH to turn your firm into an easy-to-sell asset that will allow you to retire early.**

# Meet Dave



# We want the practice

- ▶ Our chance to get out of our firms
- ▶ 300 clients
- ▶ Pearse knows most of them
- ▶ We offer 1.2 x revenue

Response?

Deal!



# Issues

- ▶ Dave was old school
- ▶ Charged for his returns in line with the local H&R Block
- ▶ Liked to visit each client on his motorcycle



# Almost every day, firm owners come to me...

- Drowning in debt and A/R without a plan to get out
- Feeling like they just can't get ahead financially no matter how much they work, unable to save for retirement, vacations, and emergencies
- Facing serious health challenges because they work so much
- Feeling like they don't charge enough, but are terrified to raise their rates for fear of losing all their clients
- With either way too many clients because they can't say no, or no clue how to attract the people they actually want to work with
- Exhausted, overwhelmed, wondering if they should just throw in the towel

**If any of that sounds like you, you're  
in the right place, but...**

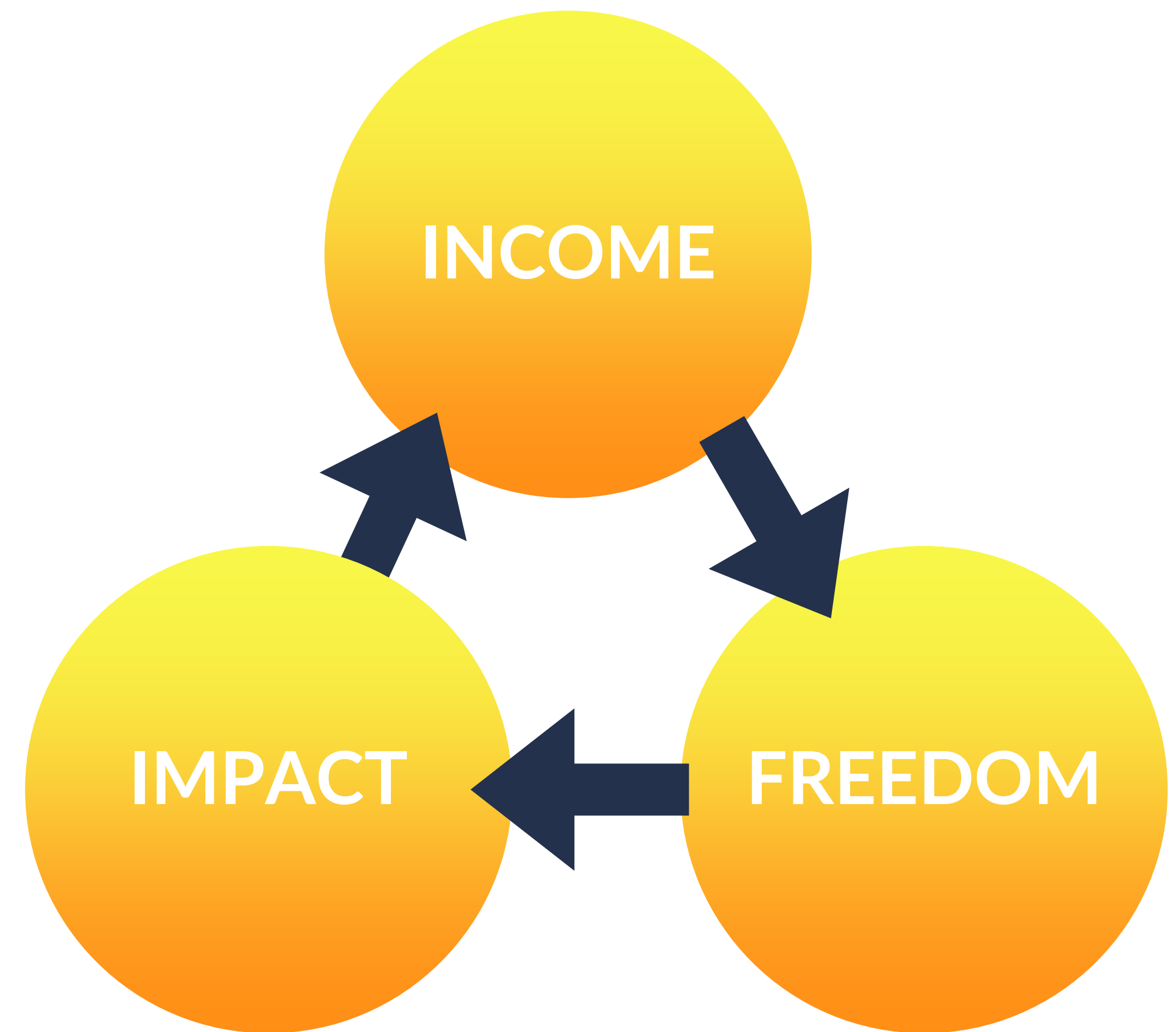
**You're going to have to work until  
the day you die if you let things  
continue this way.**



# What Do You Really Want?

After working with hundreds of firm owners, I've discovered **most firm owners started their own business for three reasons...**

But only the **top firm owners** that do the things I'm about to share with you that will get you all three.



# What We'll Cover Today

- Exactly what firm owners are doing that keeps them on the hamster wheel feeling burnt out, unhappy, and unsatisfied with their bank accounts and client roster
- The 3 P's that will allow you to earn MORE money while working LESS
- What you need to start doing TODAY so that your firm will be ready to sell when you're ready to retire (and support the lifestyle you want in the meantime)

# Why You Should Listen to Me

**I've spent 20+ years perfecting a process that allows firm owners to have time freedom and financial freedom, while serving the people they want to work with.**

**Our clients have collectively added \$XXXX in revenues and counting to their firm over the last several years.**


**When it comes to firm owners, nobody is teaching this stuff and we are the best at what we do.**





# Why You're Here...


- If you're here, it's because you know you were made for more.
- You know you are excellent at what you do...you're just not getting paid what you should be and your firm got off track at some point (or maybe has been on the wrong track since the beginning!)
- **The big question:** do you have a system for getting your dream clients, at your dream price, anytime you want? A system that will make your financial dreams come true, and that someone else could easily take over for you when you want to retire? **If not, pay close attention.**


# Most Firm Owners...


 Get as many clients as possible, even if they're not a fit

 Undercharge, do free work, & overdeliver to "prove" their value

 Give discounts & negotiate fees to get a yes from the client

 Send proposals/quotes & wait for a response

 Do work upfront & waste time chasing clients for payment

 Spend so much time working IN the business they can't plan for the future

# Why This Doesn't Work...

- You are seen as a commodity and only attract people looking for the best deal
- You have no idea what your clients really want and need, and they have no idea what you can do for them
- You grind 14 hours a day at the expense of your physical/mental health and end up burnt out and exhausted, sacrifice time with family and friends
- You feel undervalued and under-appreciated, resenting your clients and the work you are doing
- Your financial goals always seem out of reach/like you can never get ahead

Using these tactics is going to kill your business! It's not scalable, sustainable, OR sellable.

# The Wrong Way: Undercharging



# The Right Way: Command Premium Fees

- The FASTEST way to separate yourself from the rest of the pack is to offer premium services at premium prices. Higher fees actually show that you are the expert, and will attract higher value clients.
- Low value services at low prices, charging hourly, trying to beat competitors, or giving discounts are all **undervaluing your knowledge, experience, and expertise.**
- You are not selling your time or your knowledge. People pay you for the value of the RESULTS/OUTCOME you deliver.
- You can gain back time and freedom without losing any money.

# The Wrong Way: Grinding/Working More

# The Right Way: Value Over Volume

- You will never achieve time and financial freedom by grinding away, doing low value work at high volumes, discounting services, or doing work for free.
- Maximum capacity is never the optimal capacity. Start thinking about VALUE over VOLUME. Example: 500 clients at \$200/return vs. 200 clients at \$500/return, plus additional monthly services
- Upgrading your offerings & raising your standards for what you will accept from clients is key to making more money while working less.
- Hard truth: Your clients won't change until you do!

# The Wrong Way: Focusing on Getting More Leads/Marketing

# The Right Way: A Predictable Sales System

- More leads won't help if you can't convert those leads into clients.
- We want a reliable, predictable way of getting dream clients at dream prices **right now**, that doesn't depend on you simply working more hours, wasting time and money on clients you don't want to work with, or marketing tactics that don't work.
- It also has to work on autopilot, to give you the **income, freedom, and impact** you desire.
- Creating this system in your firm is **easy** if you know how. It comes down to the 3 P's

# The 3 P's

The  
Problem

The  
Pricing

The  
Process

# P #1: The Problem

- Your potential/current clients only care about one thing: **Can you help them solve their biggest problem?**
- You need to know who you help and what problem you solve for your clients — you should know their problem better than they do, and **know exactly what they're thinking and FEELING** about this problem.
- This requires speaking to a specific client with specific goals and dreams. **You can't help everyone, and you shouldn't want to either!**

When you know how to communicate the client's problem correctly, clients will automatically assume you have the solution and will be willing to pay you premium fees for it.



# P #2: The Pricing

- **Commanding premium fees** is the fastest way to reach your financial goals while working only with the most devoted and loyal clients
- Remember, **you are selling the VALUE of the outcome**, not your time/expertise
- You don't need as many clients to achieve your revenue goals, so **each client feels special and supported** like a VIP
- You will feel appreciated by clients and feel more in balance when being **appropriately compensated for your value**
- **All of the firm owners we work with use our special formula to figure out EXACTLY** what they should be charging, and can do it with confidence.

When you know how to price & package your services the right way, you show the right clients that YOU are the person they need and can get paid up front at the prices you desire

# P #2: The Process

- Not having a system in your firm is costing you time, money, stress, AND clients. You cannot continue to “wing it” or do what you’ve been doing and get different results
- Without a system in place, you will end up overworked, underpaid, and burnt out (if you’re not already...) and feel like you’ll never be able to retire
- Remember, we want a reliable, predictable way of getting dream clients at dream prices **right now**, that doesn’t depend on you simply working more hours, wasting time and money on clients you don’t want to work with, or marketing tactics that don’t work

# P #2: The Process

- We provide a step-by-step process for you to implement in your firm that takes prospects into paying clients, and current low-value legacy clients into the most loyal, high-paying ones
- This repeatable set up steps provides the reliable, predictable way of getting dream clients at dream prices
- The process allows you to feel at ease during client conversations (even ones about a huge price increase)
- Clients are led step-by-step to their own YES - there's no sleazy selling or pushy sales tactics required - and you'll always know exactly what's coming next

You can eliminate 90% of the time  
wasting strategies you've been  
doing, and replace it with this step-  
by-step process.

# Why This is So Powerful

- Your firm will start to run on autopilot and can be scaled quickly and easily, without you having to work more hours and burn yourself out
- Your confidence will go through the roof because you'll know your value and you can step into the firm owner you know you're meant to be
- You can start creating time and financial freedom **right now** so that you don't have to wait until retirement to enjoy your family, friends, and your life
- You won't have to worry about IF you can retire, because when you're ready, this system can easily be handed off to anyone that wants to buy it

So now you have a choice...

# Now You Have a Choice...

- As simple as this is, **there are a million ways to mess it up.**
- Why try to figure it out on your own when someone can just **hand you the answers?**
- I have helped hundreds of firm owners quickly grow & scale their firm revenue, eliminate A/R, and create systems that turn their firm into a sellable asset...
- **And until they're ready to retire, they can actually ENJOY their work again,** go on vacations, hire the help they need, and have more time and financial freedom to spend however they want.



My team and I have set aside some time in the next 48 hours to speak to you personally about how **you can apply these ideas to your firm starting TODAY.**

**[theabundantcall.com](https://theabundantcall.com)**

**This call is for anyone that's serious about building a 7-figure firm. We'll spend 45-60 minutes looking at what's working in your firm, what's not, and what strategies you may be missing.**

**[theabundantcall.com](https://theabundantcall.com)**

# On the Call, Our Goal Will Be to Get You Crystal Clear on These Things...

- ✓ **Where you want your firm to be and how you can get there quickly and avoid ALL the potential pitfalls along the way.**
- ✓ **The EXACT price you should be charging.** What's the magic number that will bring in the most revenue?
- ✓ **The EXACT process you should follow in YOUR firm** to confidently enroll those clients at premium fees, get paid upfront, all while reducing your workload so that you can turn your firm into a sellable asset and retire early

If we can help, we'll show you what that looks like. No matter what, you'll get major clarity, massive value, and know exactly what your next steps should be.

# Today I Shared With You...

- Exactly what firm owners are doing that keeps them on the hamster wheel feeling burnt out, unhappy, and unsatisfied with their bank accounts and client roster
- The 3 P's that will allow you earn MORE money while working LESS
- What you need to start doing TODAY so that your firm will be ready to sell when you're ready to retire (and support the lifestyle you want in the meantime)

Head to the link below to set up a  
time to talk with me and my team

[theabundantcall.com](https://theabundantcall.com)

# Q&A