

WINNER'S WRITING PROCESS

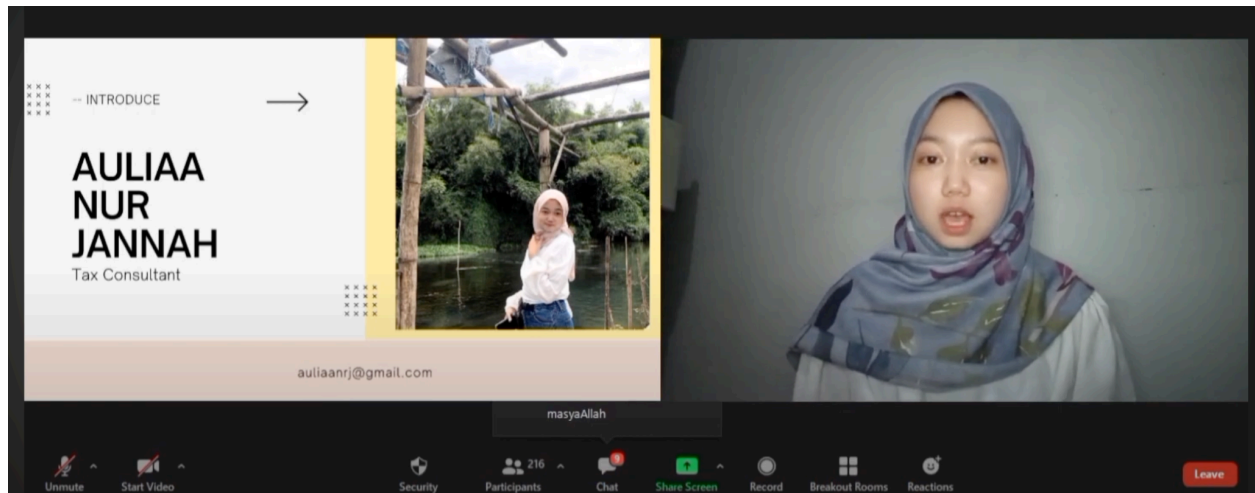
Business Type: Tax strategy coaching

Business Objective: convert Instagram followers into leads for the workshop

Funnel: social media (Instagram caption- sales page - thank you)

WINNER'S WRITING PROCESS

Avatar #1 experienced tax consultant



I'm Auliaa Nir Jannah and I love problem solving and numbers. I have a degree in accounting from a polytechnic institute. They provided me with a solid understanding of finance and taxation and also practical experience in reputable accounting firms when I learned about tax preparation and consulting firsthand. I obtained the CPA certification. I expanded my tax knowledge by attending industry conferences and events where I also gained valuable connections. Being a tax consultant requires continued learning and adaptability to the ever-evolving financial landscape.

Avatar #2 inexperienced tax consultant

I'm Tintin and I have no experience or tax consulting knowledge. I studied classic at university and had no working experience yet. I didn't need a degree to get a job in consulting and finance. All I needed was to be nice to work with somebody, able to learn, and have the potential to do the work really well. I only needed to think logically, because it's what other companies care. After university, I didn't know what I wanted to

do so I applied for many jobs. So I started applying for consulting jobs which I thought could give me the most rounded experience. So my goal was to apply to one every single day until I could apply anymore. Quantity is over quality because it's a machine that is analyzing the text, and not a person. I started using keywords in the CVs of what these companies wanted to see in the description (good communication skills, etc). In the CV you should put the things you've done and why do you think they should hire you. You should pick the individual skills you've learned doing that job and pick out how these skills relate do that job. I needed to get connections in the business I was applying for by sending messages on LinkedIn or going to a career fair university (when I was in university) and just to get in contact with the people inside the department you're applying for. So I applied by using games and interviews, and it was insanely painful. When it came to the assessment phase all I needed was to prepare for it.

Who am I talking to?



Todd W.

"Last year before I hired an advisor, I paid \$200,000 in taxes, and I got back ten grand. Then, we did cost segregation, and I ended up getting back over \$100k. It's been absolutely life changing."



Ricardo C.

"I realized that I needed help, so I signed up with a tax advisor. To me, it's been a learning experience since I don't know much about taxes and strategy. They're great teachers. I've been really learning a lot."



Adam H.

"It's been a really good decision. The team I hired helped me save a bunch of money in taxes, and we have monthly meetings, so it really feels like I have a team behind me supporting me. My business and my family, are all going to be better for this moving forward."



A. Olivera

"I wanted to find someone I could go to guide me on reducing my tax liability. Hiring a tax advisor definitely solidified my thought process around going into the real estate business and using my real estate investments as a way of saving on my taxes. Now I'm taking that money I would have paid in taxes and investing it so I can build my wealth."



Nicole E.

"I wanted to get professional guidance and strategically look at my taxes and maximize the amount of money that we're able to keep. The team successfully deployed tax strategies that they know better than the local accountants I've talked to. Now I can put that money I was paying in taxes back into my business."



Mostafa E.

"I used to pay over \$50k in taxes on my 15 properties, plus my W-2 income. My old CPAs didn't get real estate investing, but my new tax advisor changed everything. They secured real estate professional status for me, and for the first time ever, I got a refund instead of owing at year-end!"



Neema G.

"Having a team behind us looking out for our best interests and helping us maneuver through all these tax strategies has been amazing. We were completely unaware of these strategies... We thought we knew what we were doing but were just getting by. Ever since we got help, we've definitely stepped it up quite a few notches. This year, I'm super excited to leverage a lot of their new plans, their strategies and their unique tactics that they have in store for us."



Anthony N.

"I'm commission-based, and we get hit with a lot of taxes. Accounting friends told me I should start a business and get into real estate. I didn't know where to start, but I hired a tax advisor and they helped me set up an LLC for real estate and make sure I structured it correctly. Then, I started up a consulting business and this year, I think we're going to be able to write off vehicle I purchased through the consulting business. They've shown me a lot of information that I didn't know about that's definitely going to help me in my future."



Jeff M.

"If you're looking to elevate your business, you need to be working with a tax advisor. We've been blown away by their intentionality, their planning, their road mapping, and their ability to help us build out a tax strategy that's going to make us more money and protect us outside of the business realm in our personal lives. We wanted to work with someone that really understood how to articulate and break things down so we, as the client and business owner, really understand."

- 1.
2. Aspiring tax consultants and entrepreneurs who want a better understanding of taxes so they can help their clients pay zero taxes, gain the authority they need to acquire even more clients, and boost their revenue
3. They didn't go to school for anything tax-related
4. Prepared taxes for 12 years
5. Mostly men

6. I'm a 51-year-old with absolutely no income tax experience at all. I have never prepared my own taxes.
7. I'm a CPA with 10 years of experience doing tax and I'm super burnt out.
8. New business owner starting a new accountancy practice

Where are they now?

1. Problem aware
2. Stage of Sophistication 5

CURRENT STATE

What are they afraid of?

1. I was worried that not having tax and accounting knowledge could hold me back in my career
2. As a young professional, I didn't know where my career was going to map
3. Communicate with their clients
4. I'm insecure about my lack of experience
5. the first year on my own, I was scared to extend and did way too much work from 4/10-4/15

What are they angry about? Who are they angry at?

1. Companies won't even look at my resume because I wasn't an auditor. They lie and tell you in school or when you first start your job that it doesn't matter, but if you go tax you'll only be "qualified" to do tax unless you take a massive pay-cut/start over in your career.
2. The recruiters (plural) I'm working will are telling me that they don't have anything I'm qualified for and I've been working with them for 2 months.
3. I'm so sick of doing sh** returns and tax work. I'm already sick thinking of how bad next tax season is going to be and the long hours for nothing. Similar to you though the only jobs the worthless recruiters keep shilling to me are tax (staff, senior, manager). I keep telling them I want out of tax, but they say that all my experience will let me do it. It is very disheartening.

What are their top daily frustrations?

1. Zero experience or knowledge of accounting

2. They are overwhelmed by the huge quantity of tax strategies and don't know which is right for their situation, or they don't know how to apply it
3. Desperate need of advice
4. What's my why?
5. Their primary income isn't enough for them to live comfortably so they need a part-time activity that'll allow them to increase their income
6. I never intended to provide tax services in my accounting practice, but since a client's business decisions can have an impact on their tax situation I couldn't stand not to be able to provide that level of insight and knowledge for my clients
7. The IRS publications are too technical
8. My return was somewhat complex with some financial things we had done thru the tax year, not to mention pretty costly.
9. Laid off from their job
10. Hectic schedule and don't have time to sit down and learn complex tax stuff
11. We have become really busy over the last 2 years and my boss decided to stop preparing tax returns and give our 100 tax return clients to a CPA.
12. Important deadlines and deciding who to work with first
13. I hated low school and didn't know what else to do
14. Balance study and work because they are both studying and working full-time
15. VAT bills due each quarter, taxes to pay on, salaries on staff, corporate taxes on little profits
16. I was worried about getting stuck in tax out of college but it's turned out to be great.
17. Working with people who ask why they need to provide certain documentation when "they didn't need to do this last year!"
18. Working with clients that get frustrated because they don't know how to respond to their confusing questions
19. Clients who are disorganized and don't have the material to complete the returns

How does dealing with their problems make them feel about themselves?

1. Nervous about offering their services
2. I wouldn't feel comfortable solo signing/preparing tax returns until at least 3 years of experience at a PA firm
3. I was worried that not having tax and accounting knowledge could hold me back in my career
4. I was anxious about being behind because most people came from an accounting background
5. Daunted about balancing studying for the exams and working full-time
6. It was a nightmare to feed the tax man and have no money left over for them and their family

What do other people in their world think about them as a result of their problems?

If they were to describe their problems and frustrations to a friend over dinner, what would they say?

1. OMG, I'm terrified and don't know enough, in order to service a customer
2. I was about to give up so many times. I started off really good, and thought...oh this is going to be easy... Well, did I ever get a wake-up call. There were times when I just said I can't do this anymore. I would voice my comments to Ms. Colyer or Mr Brindle, and they would respond with such positive replies that just made me want to continue. I can't tell you what this means.
3. I have a pretty large chunk of them who are absolutely horrible. I get that nobody likes to pay taxes, but they act like I'm the one pocketing their tax dollars! Speaking rudely to me, asking me why they need to provide certain documentation when "they didn't need to do this last year!", and then complaining about their tax due or refund and the invoice. I am happy to provide my clients with clarification on their returns, but most of them don't even know what they are asking, and then get frustrated when I can't answer their super vague and confusing questions. I suppose I'll get better at dealing with this kind of thing over time, but it can be really frustrating when clients act like I'm stupid for not being able to read their minds. I'm still new to this field and am already a bit insecure about my lack of experience, so this kind of thing can really ruin my day. I really like working in tax - i just get so frustrated working with these people and I don't know how to deal with it. The negativity comes home with me every day, and even my husband can feel it

DESIRABLE DREAM STATE

If they could wave a magic wand at their life and change it immediately into whatever they want, what would it look like and feel like?

1. Know more about taxes so that they can pay zero taxes and keep all the money for themselves
2. train new preparers since I opened my office in 2003
3. starting my tax practice, and expanding it into a very successful part-time practice

Who do they want to impress?

1. My new employer is also impressed at how much I know because of the training. I worked hard on the courses, but I'm very satisfied with the results

How would they feel about themselves living in their dream state?

1. Stress relieved
2. I felt like I was winning.
3. I feel more confident relating to clients with the additional knowledge I have gained.
4. I feel like I have a good tax base.
5. Proud of finishing the ACA qualification

What do they secretly desire most?

1. Increase my knowledge and skills and navigate the tax field with confidence
2. Become an office manager and also regional manager and tax school instructor
3. Open their tax consulting business to get out of the rat race
4. Gain practical skills to improve their tax consultation services
5. Add a new stream of revenue to their practice
6. gain the knowledge and confidence I need to start my own business
7. With the tax knowledge I gained, I was offered a position with a local firm as a Tax Preparer. I have since advanced to Office Manager and now have a new career.
8. Feel competent in preparing individual returns at the office they work for
9. increase of capacity to acquire new tax clients.
10. Travel really far, meet new people
11. I wish I had the freedom to go start my own (complex) tax practice. I could do basic personal and corporate but I hate the clients.

If they were to describe their dreams and desires to a friend over dinner, what would they say?

1. I was able to calm my nerves after speaking with him
2. The profit and loss statement grossed \$12.4 million in 4 months
3. It has helped me gain valuable insight and knowledge I need to better serve my clients and added a new stream of revenue potential to my practice.
4. I have helped to prepare many of the client's returns over the last two tax seasons and the program helped us retain thousands of dollars

VALUES AND BELIEFS

What do they currently believe is true about themselves and the problems they face?

1. No one will hire me without a degree
2. They wanted to have an entry-level job in accounting and tax preparation was the easiest to break into the field
3. They need to increase their tax skills, no matter if they are only accountants. Because every business decision's for their clients has an impact on their tax situation
4. These opportunities (become tax professionals) are not available in bigger firms
5. A computer does the most calculations, all you need is to double check with your tax knowledge
6. You need to be able to work in a team
7. You need to know how to manage your time properly
8. Tax is a lot about legislation, cases, rules
9. They need to complete their financial accounting and tax exams in order to feel completely confident in their tax skills
10. I need a degree, I need experience in finance or consulting.
11. I see tax as the more valuable skill set to foster. Yeah, I probably can't dip out of public in 3 years for the industry, but it's the better self-employment option. I see self-employment as the better long-term wealth generator
12. Clients have high anxiety about taxes. Part of the job is therapy. Part of the job is translation. Neither of these skills is taught in accounting programs.
13. I called myself a "Fiscal Therapist" when I ran my own firm. I scrapped my own firm and went back to a corporate job because I couldn't deal with the incompetence anymore.

Who do they blame for their current problems and frustrations?

1. extensive training the tax chain companies use
2. incompetent and annoying clients
3. I just can't deal with clients making the same dumb mistakes every year.

Have they tried to solve the problem before and failed? Why do they think they failed in the past?

1. Between customers, they would practice returns to help them get up the par

2. Take the Passkey/HOCK Standard EA Course-Take the EA exam-Listen to podcast related to tax-Start preparing tax returns for [season]
3. I did Google for how to become a Tax preparer and I'm reading through the wiki how article and a few others
4. I got online and started to research taxes and how to prepare them. I researched numerous schools and settled on the Income Tax School.
5. I would start with volunteer groups like VITA to build your resume and knowledge since they take anyone with a pulse. From there you could probably apply to places like turbo tax for season work. You're also going to need to do a looooooot of reading and practice questions to hone your skills.
6. My absolute favorite was telling clients who were upset with their tax bill: "the easiest and quickest way to reduce the amount of taxes you owe is just to start making less money. You are just too good at making it! If you like I can talk to the owner about increasing our fees and that will surely get you started on the right track"

How do they evaluate and decide if a solution is going to work or not?

1. You need to have someone looking over your shoulders those first few years and someone you can go to with questions. Even though all the info is theoretically available online, nothing beats a person with experience who can tell you about the real life cases they have worked on. I wouldn't trust you with more than a very simple return with no experience, and wouldn't be willing to pay all that much.
2. What initially drew me to ITS was the price and the fact that I could do just part I (the first half of the Comprehensive Course) and do part II at a later date.

What figures or brands in the space do they respect and why?

What character traits do they value in themselves and others?

What character traits do they despise in themselves and others?

- 1.

What trends in the market are they aware of? What do they think about these trends?

PRODUCT

What do they like about the product?

1. Easy to understand
2. Affordable pricing
3. I was very impressed with the quality of your texts.
4. Quick to answer all my emails and really helped me understand content that I was having questions about
5. excellent customer service
6. When I was stuck, they would review my work (which is not easy) and send it back with corrections. One thing I liked is they never gave me an answer. They made me work for the answer but guided me in the right direction.
7. They would push me so much, I actually felt like they cared, and they wanted me to succeed. And guess what, I DID! I finished, and I have to tell you it's ALL because of them. They are both extraordinary people and GREAT if not the BEST Instructors you have and I have to tell you if it was not for them I would have never completed this course. I would like to praise Ms Colyer and Mr Brindle for their help, for their knowledge, and for their patience with me, and because as I said, if not for them I would have never received this certificate of completion.
8. I'm very impressed with the staff and with all the help that is available to me regarding the whole process of becoming a tax preparer. I feel like you're my friends."
9. I love the convenience of online course taking and it is presented so well and easy to use.
10. The curriculum is written in layman's language with plenty of straight-forward examples and relevant problem sets that crystallize the concepts well and is a good adjunct to the IRS publications which can be technical at times.
11. I think that the quizzes, review questions and learning activities covered the material in an appropriate way to make sure you grasped the concepts presented.
12. great instructor support and forums to interact with other students.
13. each course was presented and laid out for my convenience. I also like the convenience of online courses. With my hectic schedule, online courses are just what I need.
14. Though I make money teaching others, I also teach myself. So the knowledge I gained with your detailed material is well worth it.
15. one of the most effective and very affordable. I also noticed it offers a payment plan for the Comprehensive Course for those who need that option in this tough economy
16. Close-knit team and working alongside the head of tax, the heads of audit
17. The people inside the school, because they'll have friends for life
18. The social events with the group are fantast
19. Meet new people and work with new people all the time
20. Enjoyed the application process and the interview because it felt like a chat and it was informal
21. They are pretty cheap

22. Love how easy and friendly the service is in getting your taxes done. Will continue to come back!
23. Knowledgeable, efficient, and professional
- 24.

What do they hate about the product?

- 1.

What solution would they want?

1. A way to train and practice tax preparation
2. Monthly meetings so they feel like there's team behind them and they can be supported
3. The experience of getting in touch with seniors who've already gone through that training/experience/etc and asking questions that would speed up their process of mastering their tax skills and charge up to 6 figures, so they can feel at ease

Levels

1. Desire - 5
2. Certainty - 5
3. Trust - 2

What do I want them to do?

1. Stop their scroll
2. Comment below to join the webinar
3. Grab their attention again with the landing page
4. Get them to click the button that will lead them to join the community

What do they need to see/feel/experience to take the action I want them to, based on where they are starting?

Post #1

1. Quote from an important person that resonates with the target market
2. Highlight the words that are more important to remember

Caption #1

1. Introduce the quote
2. Lesson based on that quote that addresses a myth and a misconception
3. Sometimes you have to do boring things
4. Then you can live in your dream
5. I want to help you get there
6. Intro to the webinar
7. What you'll get inside
8. Qualify

Draft

Caption

Scrolling on Instagram the other day I came across a quote from Henry Block that quite resonates with aspiring tax consultants and entrepreneurs like you.

Here's what he said: "The biggest mistake people make in life is not trying to make a living doing what they most enjoy."

 YES.

What he said was pure gold.

You see, many people like you have a burning desire to become tax consultants or entrepreneurs one day.

But somehow they got discouraged by seeing those who have years and years of tax knowledge, skills, and experience on their back.

And so their 6-figure income dream slowly extinguishes.

Sound familiar?

But let me tell you this, every expert in their field was once a beginner.

Before founding H&R Block, Henry Bloch started with little more than a college education and a desire to help people with their taxes.

He began by running a small bookkeeping business with his brother, which eventually grew into the largest tax preparation company in the United States.

So it's completely normal to feel behind when you're first starting out.

But once you put in the reps, build your experience, and build your client network...

There is NO LIMIT to what you can achieve.

THAT'S when you start leveling up your client roster, getting better clients, and bringing in 6 figures a year (if that's a goal you have).

THAT'S when your passion turns into a predictable stream of income that gives you freedom for the rest of your life.

Financial freedom 🙌

Location freedom 🙌

Time freedom 🙌

Choice freedom 🙌

And I want to help you get there...

Inside Dynasty Tax Services I'll show you how to go from zero to a 6-figure tax consultant in less than 12 months.

You'll get exclusive guidance and private mentorship from an 11-year-old tax consultant expert like me.

Plus, you'll access a community of like-minded tax consultants and entrepreneurs like you who are eager to hit their 6 figures a year income goal.

And so much more.

👉 Comment "DYNASTY" and I'll send you the link to join the DTS community now!