

LINKEDIN

Headline

Executive Director at SASBA, Creator of 5-Step Plan to assist CPAs expand their new or existing CPA practice

Summary

Creator of CPA 5-Step Referral Marketing Plan, a system utilizing the principles of referrals to assist CPAs in turning their clients into an army of advocates for their business

Creator of TakeCharge Solution Program, an online educational site to help individuals take control of their personal finances in order to become debt-free

Founder and Executive Director of SASBA, a franchise-like organization for CPAs with all the benefits of a franchise without the fees / contract / royalties

Strong focus on the importance of developing a marketing strategy, combining an understanding of clients' most pressing needs with a knowledge of CPAs' mindset and strengths/weaknesses

35+ years of experience as a CPA and small business owner, with a background in management and strategic planning

Job Description

Close to 40 years ago, I started my own CPA firm – without a marketing strategy, and, subsequently, zero clients. That's when I decided to learn something about referrals. Ultimately, I became the fastest-growing CPA in Tallahassee, FL.

Today... my company SASBA is dedicated to educating CPAs about the importance of developing a marketing strategy and the process of generating consistent referrals for their business. We are a community of accountants with the same goal of growing our businesses and assisting clients with their personal finances.

I've spent 35+ years developing, testing, perfecting, and documenting the marketing, technical, and administrative systems I've used (with great success) to help accountants grow and prosper in their practices.

Group Description

Most accountants start their businesses without (1) a marketing strategy, or (2) any idea how to build a highly profitable business. Does this sound like you? Do you sit back and depend on referrals to slowly, and painfully, build your business? Do you have all the clients you want? At SASBA, we believe that developing a strong marketing strategy is the solution to the CPA's greatest problem – acquiring new clients. With a strong marketing strategy, you'll make more money, attract the right type of clients, and develop the type of practice you desire. A marketing strategy is ultimately an investment for your business. By joining our group, you'll become part of a community that is dedicated to learning and to helping one another grow. We share our expertise and our tips and tricks for putting together a marketing strategy, including our proprietary system the 5-Step Referral Marketing Plan which is proven to turn your clients into an army of advocates for your business. We understand how referrals work. And, when you partner with us, you will come to understand these principles, too.