



MARKETING A TAX BUSINESS

A practical 2026 guide to
building visibility, trust and
repeatable client growth

Built for where you are going.



Marketing begins with a clear promise

A strong plan connects the clients you want to serve with a message, channel and follow-up process your office can deliver consistently.



MARKET POSITION

BRAND SYSTEM

CLIENT FUNNEL

MEASUREMENT

This guide replaces the 2018 playbook with a modern mix of local search, referrals, digital follow-up and community visibility. It also removes risky language about the “highest refund” and demographic assumptions that do not belong in professional tax marketing.

THE GOAL

Attract clients who fit your expertise, make the first interaction easy, and give satisfied clients a clear reason to return and refer others.

THE STANDARD

Every message should be accurate, supportable and consistent with the actual services, fees and credentials of the office.

A useful niche is specific enough to guide decisions

Market research should answer who needs the service, where those clients look for help and how the office will stand apart.

CLIENT FIT

Return types, life stages, languages, business needs and service preferences your team can handle well.

LOCAL REALITY

Search demand, community patterns, competing offices, seasonal traffic and accessibility.

REASON TO CHOOSE

A clear process advantage such as secure remote service, evening appointments or small-business expertise.

Competitive review

01 Map the alternatives

Compare local independents, national chains, online filing products and free preparation options.

02 Read the market

Study search results, client questions and competitor reviews. Note recurring frustrations without copying claims or prices.

03 Choose a focused opening

Build the first campaign around one client problem and one service experience the office can deliver reliably.

Trust grows when claims are precise

Tax marketing should describe services, credentials and fees accurately. Avoid refund guarantees, misleading credentials and unsupported superiority claims.

A safer message

“We help local families and small-business owners prepare and e-file eligible returns through a secure, guided process with clear pricing and responsive support.”

Replace these phrases

! Highest refund

Explain that outcomes depend on the taxpayer’s facts and applicable law.

! Guaranteed advance

State that participating financial institutions determine eligibility, approval, fees and funding.

! IRS certified

Use the person’s actual credential or PTIN status. Do not imply an IRS endorsement.

! From \$X

Disclose conditions and keep published fee information accurate for the required period when Circular 230 applies.

Consistency makes a small office easier to remember

A practical brand system gives every touchpoint the same identity without requiring a custom design for every campaign.

Core brand kit

LOGO

Primary, light-background and dark-background versions with clear spacing.

COLORS

A small palette with accessible contrast. SwiftFP uses navy #13395F and gold #F6A31A.

TYPE

One dependable font family with clear heading and body sizes.

VOICE

Professional, direct and reassuring. Explain the process without hype.

TEMPLATES

Reusable formats for social posts, email, postcards, office signs and referral requests.

Brand check

Could a client recognize the office before reading the business name? If the answer changes by channel, simplify the system.

One funnel, five measurable moments

Marketing works when the office can see where attention becomes an appointment, a completed return and a future referral.

1 **AWARE** Local search, referrals, partnerships, events and paid media

2 **CONSIDER** Reviews, service pages, clear prices, credentials and FAQs

3 **BOOK** Simple appointment options, fast response and document checklist

4 **COMPLETE** Secure intake, preparation, review, filing and delivery

5 **RETURN** Year-round updates, next-season scheduling and referral requests

Track the handoff between stages. A campaign that produces clicks but few booked appointments has a different problem than one that produces appointments but few completed returns.

Your website should answer the next question

A visitor usually wants to know whether the office handles their situation, what the process costs and how to start.

01 Service pages

Organize services around real client needs. Explain scope, required documents and what happens next.

02 Local search presence

Keep the business name, phone, address or service area, hours and booking link consistent across listings.

03 Trust evidence

Show genuine reviews, relevant credentials, security practices and clear policies. Disclose incentives tied to testimonials.

04 Conversion path

Use one primary call to action per page. Confirm the appointment and send the document checklist automatically.

05 Measurement

Track calls, forms and booked appointments by source. Protect taxpayer data and avoid collecting sensitive documents through ordinary email.

Mobile test

Can a new client understand the offer, confirm the location or remote option, and book from a phone in less than two minutes?

Community presence can outperform broad advertising

Partnerships work best when the audience overlaps with the office's service focus and the arrangement creates a useful experience.



PARTNERSHIPS

Bookkeepers, payroll providers, insurance agents, community organizations and small-business groups.

EVENTS

Tax-season checklists, business filing workshops and document-preparation sessions without individualized tax advice.

LOCAL MEDIA

Community newsletters, podcasts and radio segments that teach one useful topic and direct listeners to a clear resource.

Partnership filter

The partner should serve a compatible audience, protect reputation and provide a trackable path to appointments. Document referral terms and required disclosures.

Referrals need a system, not a last-minute request

A clear request made after a strong service moment usually works better than a complicated giveaway.

BEST MOMENTS

After the client thanks the team, after acceptance, when a notice is resolved, or during next-season scheduling.

SIMPLE REQUEST

"If you know someone who would benefit from this process, please send them our booking page."

Referral workflow

01 Ask permission

Confirm the client is comfortable receiving future service and referral messages through the selected channel.

02 Provide one shareable link

Use a short landing page that explains the audience, process and booking option.

03 Record the source

Ask every new client how they heard about the office and connect the answer to completed revenue.



INCENTIVE CHECK

Check state rules, disclosure requirements and platform policies before offering rewards. Do not purchase or fabricate reviews.

Every campaign needs one audience and one action

A campaign becomes easier to create and measure when the office limits the message to one client need.

1

AUDIENCE
Who is this for?

2

PROBLEM
What are they trying to complete or understand?

3

OFFER
What specific service or resource is available?

4

PROOF
Why should they trust this office?

5

ACTION
What should they do next?

EXAMPLE

New small-business owners can book a 20-minute readiness call and receive a secure document checklist before the appointment.

The marketing year starts before filing season

Use a rolling calendar so creative production, outreach and follow-up do not compete with return preparation.

SEP - NOV	FOUNDATION	Update positioning, website, listings, pricing and referral partners. Build templates and automations.
DEC - JAN	PRESEASON	Reactivate prior clients, publish document checklists, open scheduling and test campaigns.
FEB - MAR	PEAK	Prioritize response time, capacity and high-performing channels. Pause campaigns the office cannot serve.
APR - MAY	EXTENSIONS	Explain extensions, balances due, amendments and notice support with accurate deadlines.
JUN - AUG	RETENTION	Review results, request feedback, reconnect with business clients and improve the next campaign.

Budget by outcomes, not activity

A channel earns more investment when it produces qualified clients at a cost the office can support.

LEADS

Calls, forms or messages from potential clients

BOOKINGS

Appointments scheduled from those inquiries

COMPLETIONS

Paid services delivered

CLIENT ACQUISITION COST

Often shortened to CAC. Total channel cost divided by new completed clients.

RETENTION

Prior clients who return for another season

REFERRALS

New completed clients attributed to existing clients or partners

Monthly review

Keep, improve or stop each channel based on completed revenue, client fit and service capacity. A low-cost lead can still be expensive if the office spends time on work it does not want or cannot complete well.

The next campaign begins with the current client

Clear updates, secure delivery and dependable follow-up make the office easier to choose again.



01 Close the engagement well

Deliver the return securely, explain recordkeeping and state how the office handles notices and amendments.

02 Stay relevant

Schedule useful touchpoints around extensions, estimated taxes, life changes and business milestones.

03 Invite the next step

Offer next-season scheduling or a planning conversation based on the client's actual needs.



Build a marketing system your office can deliver

Start with one audience, one campaign and one measurable booking path. Improve the process before adding more channels.

NEXT 30 DAYS

- Write the positioning statement
- Update the website and local listings
- Build one referral landing page
- Launch one trackable preseason campaign
- Review bookings, completions and acquisition cost

Primary sources

U.S. Small Business Administration: Plan Your Business
31 CFR 10.30: Solicitation
IRS Topic 254: How to Choose a Tax Return Preparer
IRS: Protect Your Clients, Protect Yourself
Supplied customer-feedback research