

FOR CPA FIRMS, EAS AND TAX ADVISORS

Add elite tax planning to your practice – without becoming a multi-strategy specialist.

Education, AI tax-planning software, done-for-you proposals, lead generation and coaching — the complete program for moving a firm from tax prep to proactive planning, **at every stage from a single seat to the whole firm.**

500+

CPA FIRMS HELPED TO \$1M+

\$200M+

SAVED IN CLIENT TAXES

1,200+

TAX PLANS DELIVERED

20+

YEARS IN PRACTICE GROWTH

THE SHIFT

Tax prep is becoming a commodity. Planning is where the fees, the retention and the practice value are.

Few firms have the bandwidth to build the engine — research, model, document, propose — for every high-value client. **That engine is what the membership is.** And when a planning firm wins one of your top clients, you lose a decade of revenue, not one return.

COMPLIANCE WORK

\$300 – \$3K

Typical fee for a return — seasonal, and easy to quote against.

PLANNING WORK

\$5K – \$50K

Typical retainer for proactive planning. Same book, different service.

WHAT THE PROGRAM COVERS — SIX PARTS, ONE MEMBERSHIP

01 — EDUCATION

The Academy

Tax-planning training on demand, an exclusive content library and a member forum. On every plan; whole team on Full Firm.

02 — SOFTWARE

AI tax planning

Ten minutes of intake returns a ranked shortlist with code, regs and rulings cited, a federal and state multi-year model, and a proposal plus workpapers on your letterhead.

03 — DONE FOR YOU

Proposals and deliverables

Proposals and client deliverables prepared for you, with coaching through delivery and the client relationship after the sale.

04 — PIPELINE

Lead generation, ads and CRM

A CRM for leads and clients on every plan. On Ads + Lead Gen, done-for-you campaigns and lead pipelines built and run with our team.

05 — COACHING

Sales, pricing and marketing

Personalized coaching on scoping, pricing and closing planning engagements — turning prospects into signed advisory work.

06 — PRACTICE GROWTH

Business evaluation

Two firm evaluation audits a year, and a proven path from low-margin compliance to high-value advisory.

Your judgement. The software shortlists; what fits the client is your call.

Your signature. It never files and never signs.

Your client. It never contacts them. We are not in the room.

Your fee. You set it and bill it. No revenue share.

Who you work with: Javier Gonzalez, Founder & Chief Tax Strategist (20+ years; Infusionsoft, HubSpot, Chime, Corvee) · Renato Vanzella, COO · Jafet Martinez, Attorney at Law (JD/MBA, Harvard Berkman Klein fellow) · Isaac Medina, Business Systems & AI

MEMBERSHIP LEVELS

LEVEL 01

Entry

ACADEMY + CRM

- The Academy and the CRM
- Single seat
- Quick Plans and proposals
- Full tax plans as clients need them

LEVEL 02

Full Firm

UNLIMITED

- Everything in Entry
- **Unlimited** full tax plans
- **Unlimited** team seats
- Full access to the software

LEVEL 03

Ads + Lead Gen

FULL PACKAGE

- Everything in Full Firm
- Ads and lead generation
- Campaigns run with our team
- Built to fill your calendar
- **Talk to us to start**

Monthly membership, no long-term contract.

Outputs are suggestions reviewed, selected and signed by the licensed professional at your firm — not professional advice. Fee ranges describe what firms commonly charge, not what any firm will earn; figures describe results across firms we have worked with, not a guarantee of any result.

Free 30-minute firm audit.

Bring one real client — we run it while you watch. Levels and pricing: i-taxplangrowth.com

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