

Incite Tax Referral Guideline

What is Incite Tax About

Incite means to cause to action. As **Profit Advisors**, we help our clients take action with taxes and cash flow so they can grow their wealth.

Our Core Values = Value Exchange | Self-Motivation | Constant Improvement

We work for our client and not the government. We are passionate about our *clients keeping as much money* as legally possible through tax strategies, cash management, and consulting.

1) Ideal Customer Persona

Passionate about their business. Understands the value of *their time* and that it makes sense to hire others to do everything that isn't their "why". Understands that **they create more value** in the world with better profitability. Wants to get rid of the bad stress in their life they feel around managing their cash flow.

2) List of Things Ideal Customer Might Say

- I'm sick of paying taxes
- I'm sick of payroll
- Cash flow is tight
- I hate the government
- What are they doing with my tax dollars anyway?
- My accountant isn't creating value for me
- My accountant never returns my phone calls
- I own a CrossFit Affiliate
- My books are a mess
- I don't know what to do with my money
- I'm not sure what to do for retirement
- My accountant is getting old
- I'm sick of hourly rates from my accountant
- I don't know if I can afford my next employee
- I don't know if I can afford _____ (fill in the blank really)
- Accounting sucks

3) They've Said One of These Phrases, Now What?

All you have to do is say one thing... "***I know these guys, they can help!***"

Have them email or call and we'll get them feeling much better about their financial situation.

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