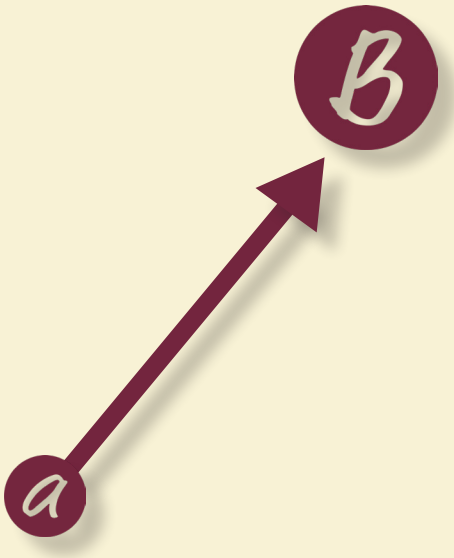
# The High-Level Playbook to Fix Tax Season

WORK LESS | MAKE MORE | HAVE MORE FUN DOING IT

1. Strategic Planning Session
2. Commit & Focus
3. It starts with YOU!
4. Go to work on your Calendar
5. Increase Time ON Business
6. Pumpkin Plan / Prune to Grow
7. Implement Boundaries & Going First
8. Coach | Mentor | Accountability Partner
9. Focus Time
10. Caitlin's | Who's | Help
11. Schedule Busy Season
12. Minimum Pricing & Price Increase
13. Increase Responsiveness & Proactiveness
14. 12-Month Business
15. First 15™ Reading Program




**Qualitative & Quantitative**

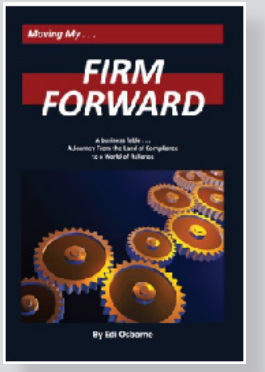
B — Ideal Clients, Work Life, Team, Money, Personal Growth, Impact

a — Great, eh & yuck, Current Clients, Where Making Money and Not, Total Hours, Tax Season, Life, Practice, Enjoyment

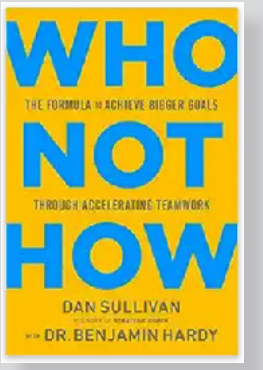
3-year approach, quarterly goals/rocks

IT'S SIMPLE . . . BUT NOT EASY . . . BUT WORTH IT . . BUT NEVER DONE!

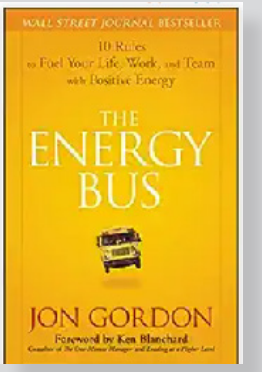
# Playbook Inspiration



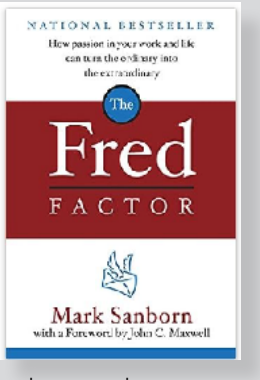

Firm Forward



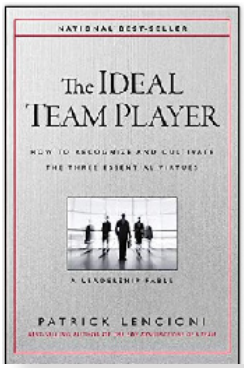

Who Not How



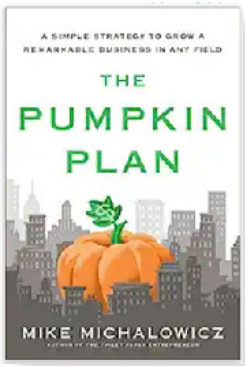

The Energy Bus



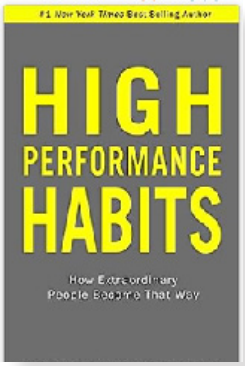

The Fred Factor



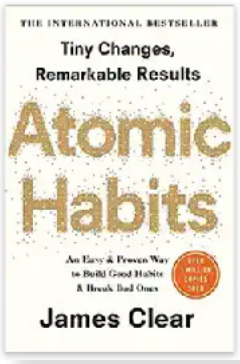

The Ideal Team Player



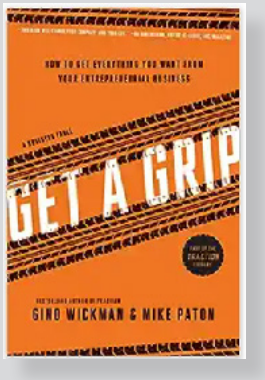

The Pumpkin Plan



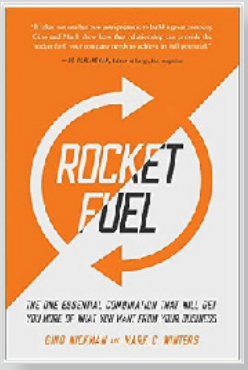

High Performance Habits



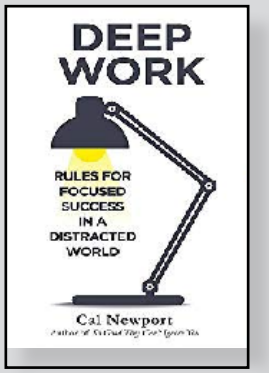

Atomic Habits



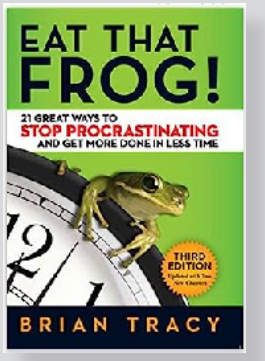

Get A Grip



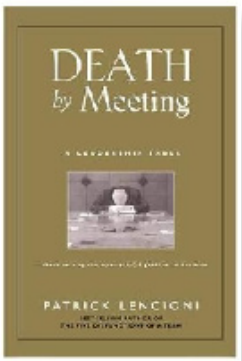

Rocket Fuel



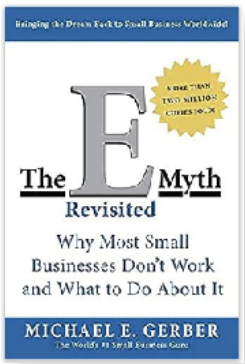

Deep Work



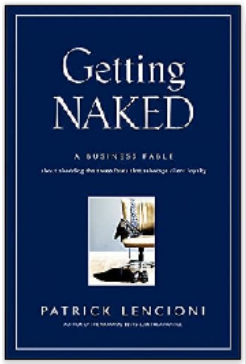

Eat That Frog!




Death by Meeting




The E Myth




Getting Naked

SJHL LLC
CERTIFIED PUBLIC ACCOUNTANTS