PATH TO 45

A 10 step quick start guide to
Working Less During Tax Season, Making More Money, and Have More Fun Doing it!

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> *“One of the hardest decisions we ever made was believing that a better tax season was possible.*
>
> *It took faith, discipline, and an incredible team—but it changed everything.”*
>
> *- Chet Buchman*

OUR STORY

There was a time when long hours during tax season felt unavoidable.

The profession accepted it.
The industry expected it.
And many of us wore it like a badge of honor.

But over time, we began asking different questions:

What if tax season didn’t have to feel this way?
What if working fewer hours actually improved client service?

What if the best firms weren’t built on exhaustion, but on intentionality?

One in which most people on our team and most weeks don’t work more than 45 hours per week. Path to 45 was created from that journey.

Not as a quick fix.
Not as a shortcut.
But as a long-term commitment to building a better way to serve clients, lead teams, and enjoy the profession again.

This guide is designed to help you begin that journey.
Have a great day -- Chet.

The Path to 45

10 Steps to a Better Tax Season

1. Define Your Ideal Tax Season Hours
2. Identify Your Why
3. Create a 3-Year Plan
4. Make the Commitment
5. Block the Time Now
6. Identify Your Top 10 Clients
7. Start Providing VIP Service **Now** to your Top 10 Clients
8. Remove Time Wasters
9. Implement Best Practices
10. Find Your Community

Chet Buchman
Managing Partner of SJHL

Romans 12:2

STEP 1

DEFINE YOUR IDEAL TAX SEASON

Every successful business establishes it's hours before customers arrive. Do the same with your tax season. Define your ideal hours first, then compare them to your current reality.
The gap between the two becomes your roadmap for change.

Decide your hours before season begins.

Your Ideal tax season hours:

	January	February	March	April 1 - 15
Mon - Thurs				
Friday				
Saturday				
Sunday				
Total				

Your Current tax season hours:

	January	February	March	April 1 - 15
Mon - Thurs				
Friday				
Saturday				
Sunday				
Total				

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STEP 2

IDENTIFY YOUR WHY

Changing your tax season requires more than tactics.
It requires purpose.

When things become difficult — and they will — your "why" becomes the reason you continue.

Why do I want to work less during tax season?

*Who **ALL** wins/ benefits when I work less hours during tax season?*

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STEP 3

CREATE A 3-YEAR PLAN

Assuming it's possible, what would be a 3 tax season phased in approach?

Last tax season hours:

	January	February	March	April 1 - 15
Mon - Thurs				
Friday				
Saturday				
Sunday				
Total				

Next tax season hours: Jan 1 - April 15, 20___

	January	February	March	April 1 - 15
Mon - Thurs				
Friday				
Saturday				
Sunday				
Total				

2 tax season's from now: Jan 1 - April 15, 20___

	January	February	March	April 1 - 15
Mon - Thurs				
Friday				
Saturday				
Sunday				
Total				

3 tax season's from now: Jan 1 - April 15, 20___

	January	February	March	April 1 - 15
Mon - Thurs				
Friday				
Saturday				
Sunday				
Total				

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STEP 4

COMMIT

I will do what it takes to achieve my ideal tax season for myself and those I care about.

I know it will not be easy, but it will be worth it.

_____ _____

Your Signature Date

_____ _____

Signature of Accountability Partner Date

_____

Printed name of Accountability Partner

STEP 5

BLOCK THE TIME NOW

If it matters, schedule it.

Businesses don't let customers decide when they're open. They establish their hours in advance—and stick to them.

Define your tax season hours before the season begins. Protect them once it starts.

Your calendar should reflect your priorities.

TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
7:00 AM	Personal time, exercise, morning routine, etc.						
8:00 AM							
9:00 AM							
9:30 AM	FOCUS TIME 9:30 – 11:30	FOCUS TIME 9:30 – 11:30	FOCUS TIME 9:30 – 11:30	FOCUS TIME 9:30 – 11:30	FOCUS TIME 9:30 – 11:30		
10:00 AM							
11:00 AM							
11:30 AM							
12:00 PM							
1:00 PM							
2:00 PM							
3:00 PM							
4:00 PM							
5:00 PM	HOME *Family. Dinner. Life. Unplug. Be present.*	HOME *Family. Dinner. Life. Unplug. Be present.*	HOME *Family. Dinner. Life. Unplug. Be present.*	HOME *Family. Dinner. Life. Unplug. Be present.*	HOME *Family. Dinner. Life. Unplug. Be present.*	HOME *Family. Dinner. Life. Unplug. Be present.*	HOME *Family. Dinner. Life. Unplug. Be present.*
6:00 PM							
7:00 PM							

BLOCK IT. PROTECT IT. ENJOY IT.

Romans 12:2

STEP 6

IDENTIFY YOUR TOP 10 CLIENTS

Your best clients deserve your best energy.

Identify the clients that check the following three boxes:

- ☑ pay you the most
- ☑ value your work
- ☑ and you genuinely enjoy serving them.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Romans 12:2

STEP 7

START PROVIDING VIP SERVICE

(TO YOUR TOP 10 CLIENTS) NOW!!

Small things create exceptional client experiences.

Simple Things You Can Do:

1. Answer their calls.
2. Respond to communication with you in the same day or at least within 24 hours.
3. Meet with them on a regular basis (ideally at least 3 times per year).
4. Remember birthdays and important life events - call, text, email them.
5. Prioritize & provide them with tax planning, not just tax projections, between October 16th & December 8th.
6. Prioritize getting their work done, including thier extra requests that come up during the year.

STEP 8

REMOVE TIME WASTERS

*Identify potential time wasters to cut, transition out of, or fix -- **and do it!!!***

Bottom 5 Clients

that I don't enjoy working with

1. _____
2. _____
3. _____
4. _____
5. _____

Top 5 to 10 Clients

to "clean up" outside of tax season
that will make my life easier

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Boards, Committees, Clubs, etc.

that I'm no longer passionate about

1. _____
2. _____
3. _____

Top 5 Clients

that I should tax plan to save heartache
& hard calls during tax season

1. _____
2. _____
3. _____
4. _____
5. _____

Top 2 Bad Habits

that I will stop doing
or at least cut back on

1. _____
2. _____

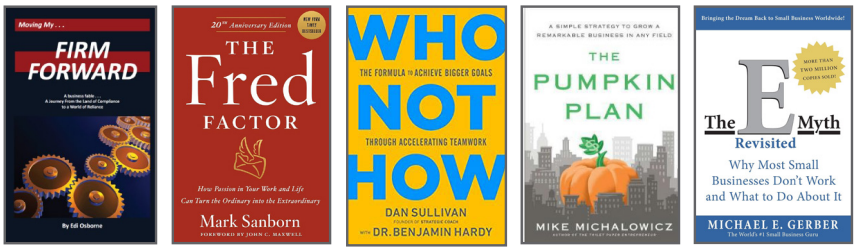
Romans 12:2

STEP 9

IMPLEMENT BEST PRACTICES

Examples of Best Practices *(Pick a few)*:

1. Raise fees each year.
2. Establish a new client minimum & stick to it.
   (Probably 50-100% more than your current client minimum.)
3. Send appointment letters to your clients in January and schedule out your tax season appointments -- both drop-offs & client meetings.
4. Read The Pumpkin Plan & go to work pumpkin planning your:
   a. clients
   b. calendar
   c. personal commitments
5. Cluster book your meeting times on meeting days with minimal dead time between them.
6. Block time on your calendar each day from 9:30 - 11:30 am for “Focus Time”.
7. Hire extra seasonal administrative help.
8. File known extensions in Jan. vs. March & April when you are at your busiest.
9. Extend more tax returns to work on throughout the year.
10. Top 5 Book Recommendations:



Romans 12:2

STEP 10

FIND YOUR COMMUNITY

Get around other similar minded people who are on the same journey.

Consider at least a few of the following:

1. Mastermind groups
2. Online communities
3. Watching the AICPA's Reimagining Your Tax Practice Sessions
4. Hiring a coach who has experience
5. Going through this guide and process with a peer

Enjoy the journey . . . it's worth it!

Want additional tools and resources?

Look here:

sjhl.com/fixbusyseason/

Looking for a coach to help with your Path to 45 journey?

Reach out!

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