

Q4 Tax Marketing Outline

October	Action Items	Completion Date
Week 1-2		
Theme	Early Bird Tax Planning	
Activities	Send out an email newsletter to your client list highlighting the importance of early tax planning for the upcoming year. Offer a limited-time discount for clients who schedule tax planning sessions during this month.	
Week 3-4		
Theme	Year-End Financial Review	
Activities	Share informative blog posts or social media content about the benefits of conducting a year-end financial review to optimize tax strategies. Host a free webinar on strategies for maximizing deductions before the year-end.	

November	Action Items	Completion Date
Week 1-2		
Theme	Holiday Tax Tips	
Activities	Create engaging social media posts or short videos with quick tax-saving tips related to holiday spending, charitable giving, and year-end expenses. Offer a downloadable "Holiday Tax Savings Guide" on your website.	
Week 3-4		
Theme	Last-Minute Tax Moves	
Activities	Send a reminder email to clients about important year-end tax deadlines. Offer a limited-time consultation discount for clients who need last-minute tax planning assistance.	

December	Action Items	Completion Date
Week 1-2		
Theme	Year-End Tax Strategies	
Activities	Share detailed blog posts or video content that explain various tax strategies for year-end, such as retirement contributions, capital gains/losses, and more. Send out a personalized email to clients with specific tax-saving recommendations based on their individual situations.	
Week 3-4		
Theme	New Year, New Financial Goals	
Activities	Send a New Year's email to your client list, emphasizing the importance of setting financial goals and planning for the upcoming tax season. Offer a discounted rate for tax preparation services to clients who book early for the next tax season.	

Bonus	Action Items	Completion Date
January		
Week 1-2		
Theme	Smooth Tax Filing Season	
Activities	Send out a comprehensive tax preparation checklist to help clients gather necessary documents. Launch a social media campaign highlighting your expertise in making the tax filing process hassle-free.	
Week 3-4		
Theme	Maximize Your Refund	
Activities	Offer a free webinar on tips for maximizing tax refunds. Send out reminders about important tax filing deadlines and extension options.	