MARKETING

MADE EASY NEWSLETTER

FEBRUARY 2026

Tax Season

Actionable ideas to help you turn tax conversations into stronger client relationships and new growth.

Leverage Tax Season to Grow Your Practice

Turn tax conversations into meaningful client value and new opportunities

Tax season is here! Most people realize that good tax planning is crucial to their retirement. Focusing on that message in your marketing and client outreach efforts can make this a highly productive time of year. Here are some tips:

Schedule Tax-Based Reviews

Review IRA contributions, RMDs, charitable giving, or Roth conversion opportunities with key clients.

Share Timely Content

Reinforce your knowledge by sharing relevant tax-focused blogs, videos, and educational resources.

Cover All Your Bases

Offer tax reviews, webinars, or educational content to showcase value in a low-pressure way.

Share Timely Content

Strengthen CPA and tax professional relationships to deliver coordinated, client-first service.

Tax-Based Bull's-Eye Marketing Tools:

Our tax-planning lead-generation system, **TaxPro,** was designed to help eliminate the most common flaws found in similar strategies offered by other FMOs.

Its proprietary features include:

- Easy implementation
- Lowest cost-per-appointment in the industry
- A proven system for converting tax clients to financial clients
- A step-by-step process for managing growth

Timely Workshops and Webinars

Quick Links

- Taxes and Fees: **Webinar**
- RMDs: **Webinar, Workshop/Seminar**

Coaching Highlights

Keep the Momentum: Don’t Pause Marketing While You Wait for Client Survey Results

In addition to tax season, market conditions are also currently right for timely messaging and internal business opportunities, as Dave discussed in his January **SIA coaching video.** Here’s why:

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1. **Many Americans are worried about a potential market pullback.**
2. **The Fed has been lowering short-term interest rates.**
3. **Long-term rates haven’t really been affected.**

These situations create a trifecta in which our income-first message can resonate strongly with potential new clients. At the same time, with annuity caps and par rates still holding strong, it allows us to seek opportunities for internal growth (while adding value for our clients) through annuity upgrades.

Marketing Toolkit

Resources to help you engage, educate, and grow this tax season

These ready-to-use resources are designed to help you maximize tax season by creating meaningful conversations, strengthening professional relationships, and showcasing your value to clients and prospects.

- **Professional Partnership**: A step-by-step guide for partnering with CPAs, estate planning attorneys, and other professionals.
- **Guest Speaker**: Use your client surveys to find timely guest speaker opportunities and high-quality leads.
- **Financial Literacy Trainer**: Arrange a retirement tax-planning talk or presentation at a local company.

Teaching Tools:

Video Animations – Titles include RMDs, Taxes & Fees, Social Security, IRAs, and more.

Use these tools to stay proactive, consistent, and visible throughout tax season, so you're not just answering questions, but leading the conversation.