



**TIBURON STRATEGIC ADVISORS**

Strategy Consultants to Financial Institutions

*Financial Advisors Research Report Series*  
&  
*Financial Institutions Research Report Series*

A Comprehensive Overview of the  
Product Usage, Business Models,  
& Best Practices of  
Independent Tax Professionals

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*June 2003*

## TABLE OF CONTENTS

<b><u>INTRODUCTION</u></b>	<b><u>6</u></b>
<b><u>BENCHMARKING: A DETAILED REVIEW OF OVER FIFTY KEY BUSINESS PRACTICES OF TAX PROFESSIONALS</u></b>	<b><u>43</u></b>
<b><i>Business Background &amp; Industry Position</i></b>	<b><i>43</i></b>
Business Tenures	43
Age	43
Became CPA or EA	44
Started or Joined Current Business	45
Added Financial Planning Capabilities	46
Joined Current Broker/Dealer or Custodian	47
Licenses & Designations	48
Prior Occupations	49
Conferences Attended	50
CE Providers	52
Publications Read & Web Sites Visited	54
Publications Read	54
Web Sites Visited	57
Conclusions	58
<b><i>Clients &amp; Marketing Strategies</i></b>	<b><i>59</i></b>
Office Locations	60
Client Ages	61
Client Incomes	62
Market Segments Served	63
Sources of New Client Assets	64
Marketing Methods	65
Marketing Materials Used	66
Seminar Materials Used	67
Newsletters Used	67
Web Site Developers Used	68
Conclusions	69
<b><i>Tax &amp; Accounting Business Practices</i></b>	<b><i>70</i></b>
Revenue Allocation	70
Tax Services Revenues	71
Accounting & Book Keeping Revenues	72
Financial Planning Revenues	72
Number of Tax Returns Completed	73
Aggregate Number of Tax Returns Completed	73
Types of Tax Returns Completed	75
Tax Software Used	77
Tax Research & Alert Services Used	80
Accounting Software Used	81
Reasons for Entering Financial Planning	83
Model for Entering Financial Planning	84
Methods of Transitioning Tax Clients	85
Time Allocation & Efficiency	86
Time Allocation	86

Time Efficiency	87
Conclusions	88
<b>Financial Planning &amp; Investment Management Business Practices</b>	<b>89</b>
Investment Products Used	90
Mutual Fund Companies Used	91
Annuity Companies Used	93
Turnkey Asset Management Programs (TAMPs) Used	94
Separate Account Managers Used	96
Other Insurance Products Used	97
Insurance Companies Used	97
New Investment Products Used	99
Independent Broker/Dealers, Custodians, & Clearing Brokers Used	99
Independent Broker/Dealers & Custodians Used	99
Clearing Brokers Used	101
Specialized Trust Companies Used	102
Financial Planning Software Used	103
Asset Allocation Software Used	104
Data & Research Services Used	106
Portfolio Management Software Used	107
Contact Management Software Used	108
Conclusions	110
<b>Business Economics</b>	<b>112</b>
Staffing	112
Employee Mix	112
Number of Partners	114
Number of Employees	114
Total Staff	115
Financial Planning Revenue Allocation	115
Income Statement Highlights	116
Number of Tax Clients	117
Number of Financial Planning Clients	117
Assets Under Administration	118
Revenues	119
Expenses	119
Pre-Tax Profits	120
Conversion Ratio (Financial Planning Clients/Tax Clients)	121
Return on Assets (Financial Planning Revenues/Assets Under Administration)	122
Pre-Tax Profit Margins (Pre-Tax Profits/Revenues)	122
Total Revenues Per Tax Client	124
Tax Revenues Per Tax Client	125
Assets Under Administration Per Financial Planning Client	125
Financial Planning Revenues Per Financial Planning Client	126
Pre-Tax Profits Per Tax Client	126
Tax Clients Per Partner	127
Financial Planning Clients Per Partner	128
Assets Under Administration Per Partner	129
Revenues Per Partner	130
Pre-Tax Profits Per Partner	130
Tax Clients Per Employee	131
Financial Planning Clients Per Employee	132
Assets Under Administration Per Employee	133

Revenues Per Employee	133
Pre-Tax Profits Per Employee	134
Annual Growth in Number of Tax Clients	135
Annual Growth in Number of Financial Planning Clients	135
Annual Growth in Assets Under Administration	136
Annual Growth in Revenues	136
Annual Growth in Pre-Tax Profits	137
Referrals Made	137
Propensity to Make Referrals	137
Frequency of Referrals	139
Expense Allocation	139
Non-Owners' Compensation	140
Technology Expenses	141
Rent/Marketing Expenses	142
Conclusions	142
<b><i>Business Policies &amp; Industry Views</i></b>	<b>144</b>
Business Goals	144
Business Threats & Challenges	145
Fee-Accounts Pricing Schedule	146
Fee-Based Brokerage Accounts	146
Broker Wraps	147
Mutual Fund Wrap Accounts	147
Separately Managed Accounts	148
Hourly Rate	148
Retirement Plans	149
Business Exit Strategies	149
Written Business Documents	150
Client Agreements	151
Compliance Manuals	152
Policies & Procedures Manuals	152
Business Plans	152
Employee Manuals	153
Marketing Plans	153
Employee Evaluation Procedures	154
Succession Plans	154
Financial Advisor Coaches	155
Conclusions	156
<b><u>KEY TIPS FOR INDEPENDENT TAX PROFESSIONALS</u></b>	<b>158</b>
<b><i>The Opportunity for Building a Financial Planning Business</i></b>	<b>158</b>
Client Economics Analysis	158
Total Client Revenues Analysis	159
Financial Planning Revenues Analysis	159
Like-Size Firms Analysis	160
Overall Revenue Analysis	160
Per Partner Revenue Analysis	160
Per Employee Revenue Analysis	161
Largest Firms Analysis	162
Size Impact Analysis	162
Time Allocation Analysis	163
Conclusions	164

<b><i>Building a Business Based on the Key Learnings from Independent Tax Professionals</i></b>	<b>164</b>
Determine Clear Conversion Expectations & Develop Systematic Conversion Processes	165
Conversion Ratios	165
Conversion Techniques	166
Choose Product & Service Offers to Support the Conversion	167
Fee-Based Pricing Models	167
Investment Consulting	169
Wealth Management & Life Planning	169
Continue Growing Core Tax Business	171
Target Markets	172
Sales & Marketing Techniques	175
Build the Necessary Support Infrastructure	177
People Leverage	177
Technology Use	182
Define Business Goals & Develop Written Plans	183
Economic Measures	183
Business Documentation	185
Succession Plans	186
Financial Advisor Coaches	187
Conclusions	187
<b><u><i>VENDOR FEEDBACK &amp; TIPS FOR BETTER SERVING INDEPENDENT TAX PROFESSIONALS</i></u></b>	<b>189</b>
<b><i>Independent Broker/Dealer &amp; Custodian Utilization &amp; Satisfaction Ratings</i></b>	<b>189</b>
Financial Planning Model Utilization	189
Independent Broker/Dealer & Custodian Utilization	190
Independent Broker/Dealer & Custodian Satisfaction	191
Detailed Feedback on Independent Broker/Dealer & Custodian Offer Components	192
Customer Service & Operations	192
Product, Sales, & Marketing Support	192
Technology Offerings & Support	192
Training & Educational Opportunities	192
Payouts & Fees	193
Executive Management	193
OSJ Managers	193
Field Support	193
Satisfaction with Clearing Brokers & Specialized Trust Companies	193
Satisfaction with Clearing Brokers	193
Satisfaction with Specialized Trust Companies	194
Conclusions	194
<b><i>Mutual Fund Company Utilization &amp; Satisfaction Ratings</i></b>	<b>194</b>
Mutual Fund Company Utilization	194
Mutual Fund Company Satisfaction	195
Detailed Feedback on Mutual Fund Company Offer Components	196
Conclusions	196
<b><i>Other Vendor Utilization &amp; Satisfaction Ratings</i></b>	<b>197</b>
Utilization of All Leading Vendors	197
Satisfaction with All Leading Vendors	197
Conclusions	198

<b><i>Strategic Value Added Opportunities</i></b>	<b>199</b>
Conversion Assistance	199
Product & Service Expansion Assistance	200
Sales & Marketing Assistance	201
Business Building Assistance	202
Succession Planning Assistance	204
Conclusions	204

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