



CPA School Agenda

9:00 AM	Welcome and Program Overview
9:30 AM	The Secrets to Working with CPAs <ul style="list-style-type: none">• Understanding the CPAs World• Why CPAs need you more than ever!
10:15 AM	The Table Bay CPA Advantage Edge Program™ <ul style="list-style-type: none">• Attracting CPAs to work with you• How the Process Works• Best Practices Tour
11:00 AM	The CPA Interview Process <ul style="list-style-type: none">• The Initial Meeting/ Key Components of Value• Follow Up Meeting – Discovery Meeting• Solutions Meeting – Next Steps Planning
12:00 PM	Working Lunch / The Tools of the Program
1:30 PM	The Client Interview Process <ul style="list-style-type: none">• Paul Revere – The Tax Man is Coming!<ul style="list-style-type: none">○ Letters / Workshops/ Tax Returns / Client Events• Three Interview System<ul style="list-style-type: none">○ The Intrigue Interview○ The Discovery Interview○ The Solutions Interview• Logistics• Understanding the roles you play• Waivers
3:30 PM	Role Play Exercises/ Objections/ Acceleration
5:00 PM	Closing Remarks