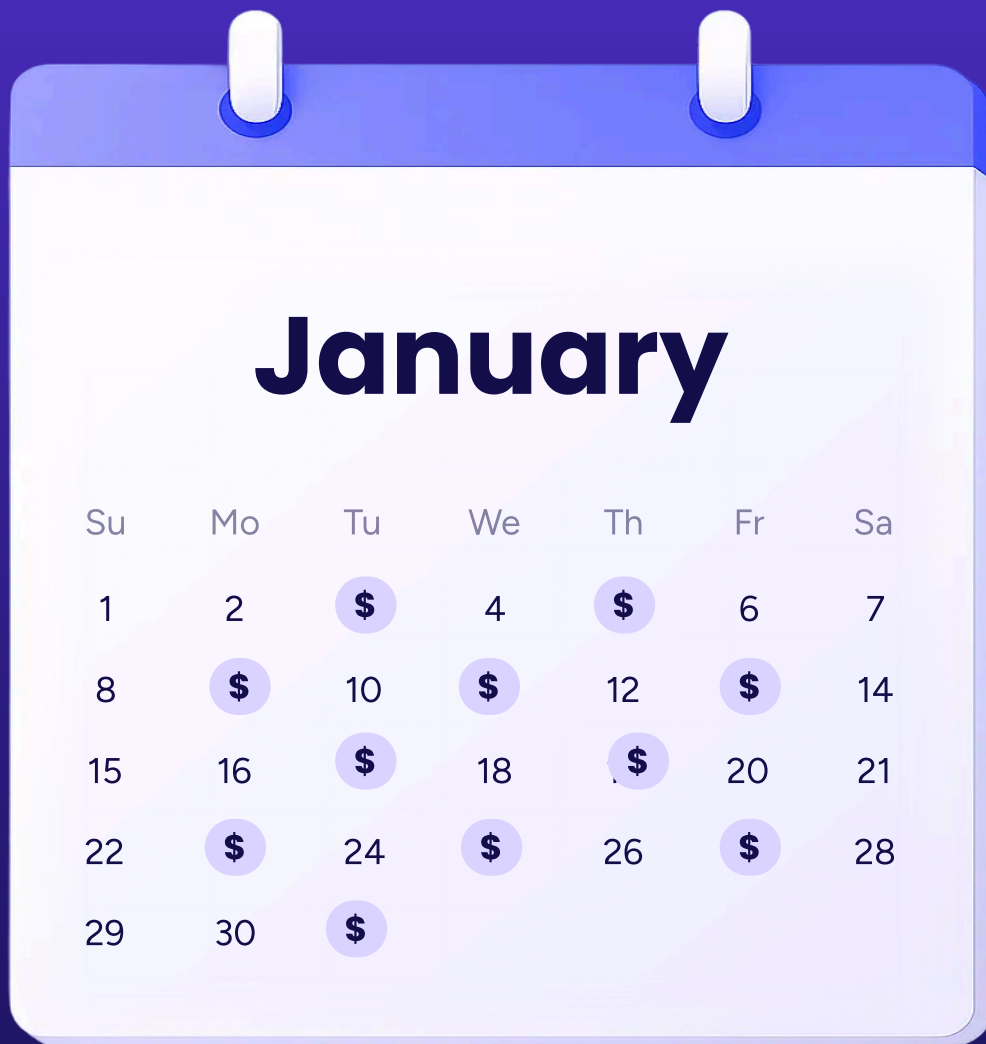




Best tax season ever (2026 edition)



A 14-day reset for predictable cash flow

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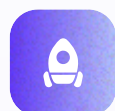
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Plan 3: Lock in certainty, protect your time from unbillable work, & grow your (profitable) revenue

Turn once-a-year tax work into stable, recurring revenue all year.

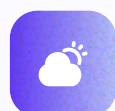
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Before the rush begins

A note from someone who's been there.



Tal Ben Bassat, CPA

COO & CFO at [Anchor](#)
(and former tax firm owner)

I've been where you are.

Before Anchor, I ran my own tax firm. And even though I don't anymore, I still feel that familiar tension when tax season hits and the volume spikes: the inbox floods, deadlines close in, and even great teams start to run on fumes.

If you're already feeling that pressure, I get it - and it's exactly why we created this playbook.

Before any firm can improve the way tax season feels, it helps to take a clear look back at the last one: where time slipped away, where work went unbilled, and where the chaos crept in.

This playbook will help you tackle those challenges. You don't have to reinvent your firm or add to your already full plate. What matters is structure: clear expectations, early client commitment, and systems that keep billing, approvals, and compliance on track from day one.

Inside, you'll find three proven action plans you can implement in 14 days or less to transform tax season. Each one addresses different pressures uncovered in your review of the previous year:

	 Plan 1 (Core)	 Plan 2 (Advanced)	 Plan 3 (Pro)
Goal	Lock in certainty	Lock in certainty + Protect your time from unbillable work	Lock in certainty + Protect your time from unbillable work + Grow (profitable) revenue
Core benefit	Remove billing guesswork so you get paid on time, every time.	Pull cash forward and protect your time.	Turn once-a-year tax work into stable, recurring revenue all year.
How	Choose between two simple billing structures.	Incentivize early payment and offer optional add-ons.	Stable monthly revenue with embedded CAS offering.

The process is simple: choose a plan (or a blend of plans), [schedule a call](#) with one of our advisors, and let us show you how to roll it out.

You can still set the tone for the rest of the season. The next few pages outline exactly how to do it, including a step-by-step timeline that fits your workflow and clears the way for client work.

Firms already using these plans aren't just surviving tax season - they're thriving in it. And the same can be true for you. Let's dive in!

How firms make it happen

The enablers that drive certainty, protect your time, and grow revenue with Anchor.

All three action plans run specifically on Anchor, an [autonomous billing & collections platform](#). Anchor eliminates the manual steps between doing the work and getting paid by simplifying and automating proposals, engagement letters, invoices, payments, agreements, and client engagement in a single connected flow, so your team can stop chasing invoices and focus on serving clients.

Thousands of bookkeeping, accounting, and tax firms have switched to Anchor and have:

- **Increased profits** by 30% or more.
- **Reduced revenue leakage** from 5% to 1%.
- **Cut agreement turnaround times** from weeks to less than 24 hours.
- **Saved thousands of dollars annually.**

"Anchor has brought me peace of mind when it comes to managing billing for my business. Their billing agreements are a standout feature, they provide complete transparency between my clients and me, ensuring we're always on the same page about services and costs."

Leah Ilanah, Bookkeeping and Tax Services

"I run a tax firm and have been looking forever for a way to create advisory packages for my client to self-select. Been through many different software and spent a LOT of time trying to sustain that. When I heard about Anchor, I checked it out, the ease of the set up and sending the packages is mind-blowing!"

Manasa Nadig, Owner, Founder

"Anchor has been great for simplifying my billing. Super easy to use, and I really like that invoices go out automatically - it saves me a lot of time. Clients pay faster now too, which has been a nice bonus. Overall, it's just made the whole billing process way less of a headache."

Robert S., Managing Partner

By removing the busywork from billing, Anchor gives accounting and professional services firms the structure, predictability, and confidence to plan ahead, strengthen client relationships, and unlock growth.

Your tax season playbook: How it runs on Anchor

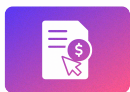
While Anchor includes hundreds of features, the following capabilities are core position players that bring the suggested action plans to life. Some of them appear in all three plans, others are unique to specific ones. All of them are available and free to use with Anchor.



Bulk onboarding

Get your firm set up in days, not weeks.

Our team handles the move to Anchor for you, quickly importing your clients, services, pricing, and agreements. You skip the admin work and back-and-forth that slows most transitions. No spreadsheets to clean, no templates to rebuild. Share the needed data, and we'll take it from there. Most firms are set up and ready to build proposals, renewals, and tax-season workflows within a few days.



Enhanced proposal tool

Build trust, speed up approvals.

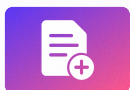
Include add-ons, optional services, and a wide range of tax services in a single proposal. Anchor gives you the ability to include 1040s, 1065s, 1120s, and even Form 7216 in every proposal, as part of the same approval flow. Clients review services, agree to your terms, and select options in one step. Once accepted, billing runs automatically, and each proposal includes a full audit trail.



Conditional discounts

Create urgency with clear, automated incentives.

Anchor lets you set time-based discounts that update automatically as deadlines pass. These incentives use familiar behavioral cues, including cognitive biases, which prompt clients to act sooner and, in turn, pull commitments and cash flow forward. You define the windows that fit your workflow, and Anchor applies and removes them in real time. Clients always see accurate pricing and clear timelines.



Optional services

Use dynamic pricing to guide client choice.

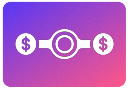
Anchor makes it easy to offer à la carte services, like audit protection, consultation time, or extension filing, in every proposal, with a click. This lets clients choose their level of support while your firm captures more of the value you already provide. Each selection automatically updates the engagement letter, pricing, and billing. Optional services are especially useful in tax season, when scope can shift and clients need quick access to add-on support.



Tiered packages

Present clear, value-based pricing options.

Anchor helps you organize services into tiers for different levels of value and support. This makes options easier for clients to understand and positions higher-value tiers as the natural next step when more support is needed. Each tier has its own pricing, services, and billing schedule. Clients choose what fits, and Anchor handles approvals, updates the engagement letter, and automates billing.



Flexible pricing ranges

Protect your margin when scope shifts.

Anchor lets you set pricing ranges in every proposal so you can bill accurately when work takes longer than expected. Instead of a single fixed fee, you can present a range (e.g., \$600-\$1,000) and bill within the approved amount once the work is done. Clients see and approve the range upfront, setting clear expectations, and you can bill for the full scope without awkward conversations or write-offs.



Bulk proposals

Send personalized, interactive proposals at scale.

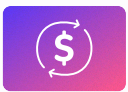
With Anchor, each proposal serves as a complete engagement letter with your pricing, services, packages, and add-ons included. You can create and send hundreds or thousands at once. Upload your client details, and Anchor handles the rest. Clients on the go can review and sign from their smartphones, and payment details are connected during approval so billing begins automatically. [Contact our team](#) for help setting up your bulk send for tax season.



Automatic invoices

Eliminate manual invoice prep and sending.

Anchor turns invoicing into a fully automated background process. Once a proposal is signed, invoices are generated according to your defined terms and sent on schedule. Each invoice is created consistently, tied to the services and pricing your client already approved, and synced directly to your accounting system for real-time reconciliation and error-free records.



Seamless payments

Get paid automatically, without follow-ups.

Anchor collects payment details during approval, so billing runs automatically on your schedule. ACH settles in 2-2.5 business days, and credit card fees are paid by the client. When work or milestones are completed, Anchor can trigger the invoice automatically or let you send it manually. Either way, payment is collected without reminders, keeping cash flow predictable and reducing manual delays.



Interactive agreements & compliant amendments

Keep every client agreement clear, consistent, and compliant.

Anchor stores proposals, amendments, and service updates in one centralized agreement. Clients accept your compliance rules upfront. Pricing or service changes use the same approval flow with optional auto-approvals. Invoice corrections stay within the same engagement and sync to your accounting system. All changes are logged in a full audit trail.

Ready to see these features in action?

[Book a call with Anchor today!](#)

Stop losing revenue to unbilled work



Grow beyond 1040/1120s and stay compliant with Form 7216.

Anchor captures all your billable services and required consent forms within a single approval flow, so you can grow beyond 1040/1120s, reduce unbillable work, and stay compliant without extra steps.

Most tax platforms only let you bill for the return itself. Everything else, from advisory questions and extensions to audit protection and owner 1040s, gets handled offline, underbilled, or never billed at all. A “quick question” turns into 45 minutes, and firms quietly lose thousands each season to unbillable work.

Anchor closes these gaps by bringing the entire engagement into one flow. Clients see all add-on services up front, choose what they need, and approve billing before work starts. Anchor is the only platform that lets you bill for value-added services alongside standard filings such as 1040s, 1065s, and 1120s, and capture required client consent forms, including Form 7216, in the same approval process.

Everything is connected, accurate, and stored in one place, with a full audit trail. No more scattered PDFs, missing consent forms, or billable work that never makes it onto an invoice.

What firms gain with this structure:

- **Bill for the full scope of work**
Advisory time, extensions, audit protection, owner 1040s, and other add-ons are priced and approved up front, inside the engagement letter, rather than handled offline or written off later.
- **Collect payments at the right moment**
Even if you bill at completion, you can simply click “Bill Now,” and Anchor will send the invoice and automatically collect the already-approved amount. Work and payment stay in sync without manual chasing.
- **Stay compliant without extra steps**
Clients agree to your change rules and consent forms (including Form 7216) during proposal approval. You can also set auto-approval windows, such as seven days, to prevent delays while keeping a clean audit trail for every change.
- **Kick off work immediately**
Signed engagements sync to Double, Karbon, Financial Cents, and other tools so your team can start right away, with scope, pricing, and consents all captured and approved.

This unified workflow prevents revenue leakage, keeps you compliant, and ensures your firm captures the full value of every engagement - locking in certainty, protecting your time from unbillable work, and growing your profitable revenue.

Now, let's explore how these powerful enablers work together via three proven action plans to drive certainty, protect your time, and grow revenue.

Plan 1: Lock in certainty

Remove billing guesswork so you get paid on time, every time.

The “structured payment” plan.

If you prefer a simple, familiar approach, this action plan was made for you. It’s a straightforward, professional way to align client commitment with real progress, reduce uncertainty, and keep work and payments in sync.

What: Use simple billing structures to ensure on-time, complete payment.

This plan includes two options for replacing reactive billing with clear, pre-agreed terms that connect payments to progress:

- **50/50 milestone billing:** Clients pay half upfront to reserve their place in your queue, and the remaining half upon delivery.
- **Upfront payment + pricing range:** Clients pay a deposit and approve a pricing range, so you can bill accurately when the work is complete.

In both cases, clients see exactly when and why each payment occurs. It sets clear expectations from day one and removes the need for follow-ups or awkward payment conversations.



50/50 milestone billing turns tax work into a predictable revenue stream by tying each payment to clear progress.

How: Choose between two simple billing structures.

With Anchor, you can set up each engagement using one of the two options listed above:

Option 1: 50/50 milestones

- **Milestone 1:** 50% is paid automatically, upon approval of the agreement.
- **Milestone 2:** The remaining 50% is charged when the return is filed or the project is marked complete.

Option 2: Upfront payment + pricing range

- **Charge an agreed-upon amount upfront**, automatically on acceptance.
- **Present a pre-approved pricing range** (for example, \$600–\$1,000) in the proposal.
- **When the work is complete, bill the final amount** within that range based on the actual scope.

Anchor handles [invoices and payments](#) as milestones are reached. Use bulk proposals to apply this structure across your client list so every proposal follows the same automated schedule, without manual chasing or delays.

Why it works.

These structures create certainty at [every stage](#), from the beginning of the engagement through completion. Clients know precisely when they'll be charged and what progress those payments represent.

With 50/50 milestones, you stop waiting for post-filing payments and effectively guarantee you're paid on a defined schedule, not weeks after delivery. With upfront payment and a pricing range, you can bill for the real scope of work, including inevitable changes, without awkward conversations or write-offs.

Each signed proposal becomes a predictable, time-bound revenue stream rather than an open-ended promise. Your team stays funded as work progresses, clients stay engaged, and tax season runs on a calm, professional rhythm without friction or follow-ups.

"Anchor has helped streamline my invoicing. For my tax clients, it's helped get payment in advance as well as have them sign my client service agreement in advance. There's no startup fee, and they spent all the time I needed to help me."

Stephen Esmond, E.A., Treasurer

Best for:

Firms handling straightforward tax submissions that need a dependable structure to ensure on-time payment and remove AR from tax season. These models provide financial and operational certainty by linking each payment to clear milestones or a pre-approved pricing range.

If your goal is to remove post-filing collections and know exactly when cash will hit your account, this is your play.

Enablers



Bulk proposals: Roll out milestone or upfront + range terms across all engagements at once.



Enhanced proposal tool: Supports multiple pricing models. Once a stage is marked complete or a final amount is reached, invoices and payments run automatically.



Flexible pricing ranges: Present and approve ranges up front, then bill accurately for the real scope of work without awkward follow-ups.



Automatic invoices & seamless payments: Invoices are issued automatically at each milestone or completion, and payments are collected without manual chasing.

FAQs

Do clients really agree to pay 50% upfront?

Yes. When you position it as reserving their spot in your queue and keeping their return on track, most see it as professional and fair. They're committing to progress, not prepaying for uncertainty.

Can we adjust the structure by service?

Yes. With Anchor, you can choose 50/50 milestones or an upfront payment + pricing range, and you can adjust percentages and ranges by service or client type.

How do clients respond to pricing ranges?

Most prefer the transparency. They see the range upfront, understand what could drive the final amount, and know you'll bill within that approved band. It reduces surprises for them and write-offs for you.

Will clients push back on milestone pricing?

Based on our data, it rarely happens. Clients appreciate knowing when and why payments occur. It creates transparency, builds trust, and shows your firm runs on clear systems.

What makes this better than billing at completion?

It gives you certainty during tax season and eliminates the risks and friction that come with billing after delivery. Work and payment move together, so there are no long gaps or follow-up cycles after filing.

Plan 2: Lock in certainty & Protect your time from unbillable work

Pull cash forward and protect your time.

The “tiered options” plan.

If you want tax season to feel clear and controllable instead of chaotic, this action plan makes it possible. It’s the same approach top-performing firms use to collect most of their tax-season revenue early in the season and protect their calendar in the process.

“Last tax season was the absolute best season we’ve ever had. We got paid over 90% of our annual revenue before tax season started, thanks to Anchor’s bulk proposals. It was truly amazing!”

Nick Boscia, Partner [Boscia & Boscia PC](#)

What: Secure your revenue and your calendar before the work begins.

This plan helps you lock in commitments early by combining tiered packages, time-limited incentives, and next-year pricing. Clients are rewarded for acting quickly, not pressured into discounts, and your team gains clear visibility into workload, capacity, and payment schedules before the season begins.

Within each proposal, use transparent pricing tiers and conditional discounts that expire on set dates. Early-action pricing feels like a benefit because your base rates rise for the following year. Optional services such as consultation calls, audit protection, or priority filing add value to clients and protect your team’s time.

The result is a structure that rewards proactive clients, sets clear boundaries on your availability, and secures predictable revenue weeks before the rush begins.



Sign and approve by January 15
15% off



After January 15
Standard pricing applies

How: Publish pricing early and automate clear incentives through proposals.

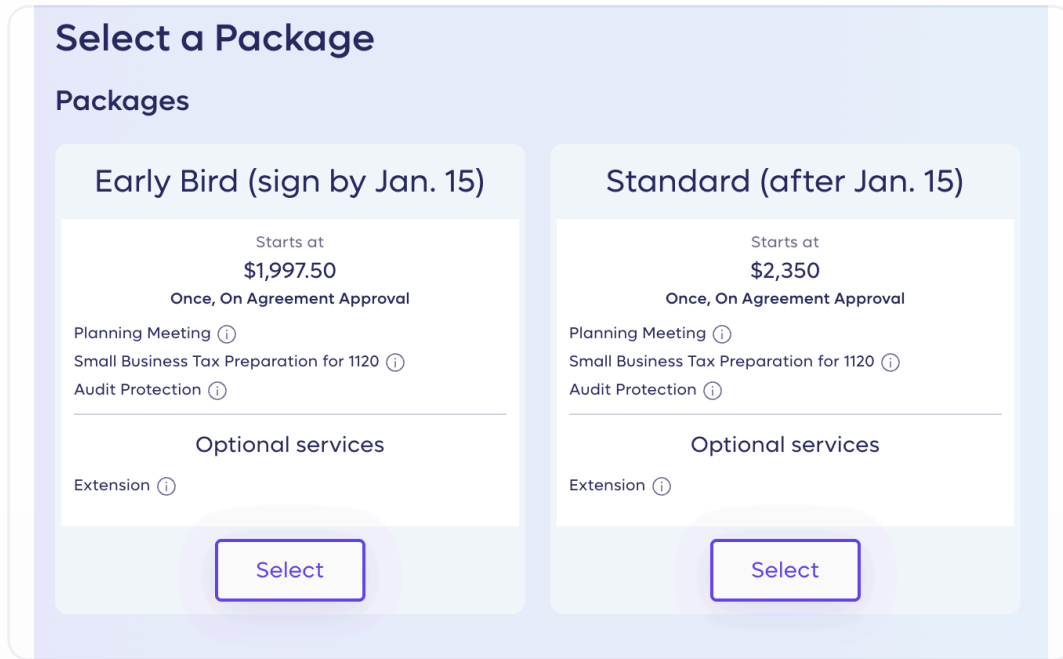
Release updated pricing as soon as you’re ready (many firms do this in late fall, but January still works). Create two or more packages in your Anchor proposals, each with auto-expiring incentives that update as deadlines pass.

For example:

- **Sign and approve by [date 2-3 weeks out]** → secure preferred 2026 pricing.
- **After [date]** → full standard pricing applies.

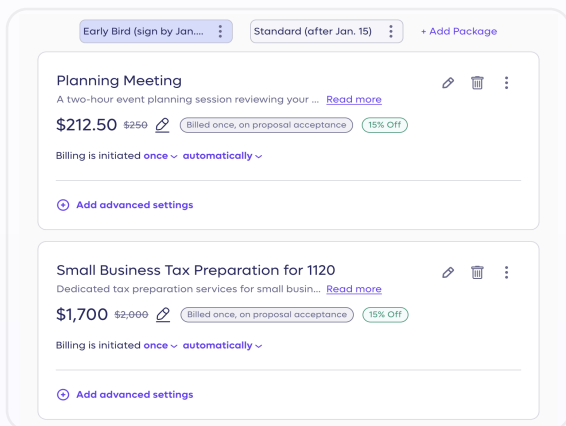
That’s it. One incentive, one deadline.

Set these windows in your bulk proposals so each client sees their own deadline and incentive. Anchor automatically applies the correct price, removes expired discounts, and collects payment as soon as clients sign.

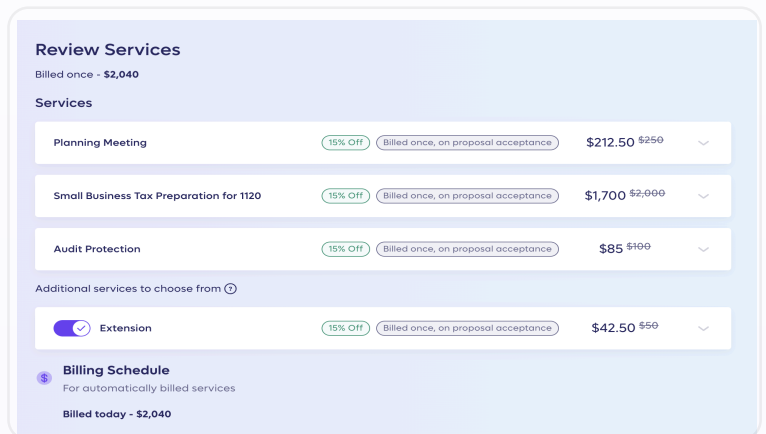


Anchor automatically applies or removes your early-signing incentive once the deadline passes, so clients always see accurate pricing.

You can tailor the timing of proposal submissions to different client segments, but the incentive structure should remain simple: one clear deadline per group. Once live, the process runs automatically in the background, with no manual follow-up or tracking required.



Add services as different packages within a single proposal. Create conditional discounts for early signers.



When clients receive your proposal, they can view each package to see all applicable details.

Why it works.

This plan [creates predictability](#) through structure and timing rather than pressure. Clients who act early secure their preferred pricing and services, while your firm gains more control, faster cash collection, and a manageable pre-season workload.

[Clear deadlines](#) and [visible rewards](#) prompt faster decisions. Firms using this approach often collect most of their tax-season revenue before peak delivery weeks, significantly minimize AR tied to returns, and protect their teams from last-minute work that never gets billed.

Best for:

Firms that want to generate revenue early, create breathing room during the busiest months, and stop chasing late signers. This works across both individual and business clients, and is especially effective for firms with large recurring client lists or seasonal bottlenecks.

If you've ever found yourself saying, "We'd be fine if people just signed sooner," this is your play.

Enablers



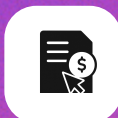
Bulk proposals: Send personalized, incentive-based proposals to every client at once. Auto-personalization and expiration logic are built in, so pricing and reminders update automatically.



Conditional discounts (auto-expiring incentives): Build time-bound incentives that apply and expire automatically. Clients see exactly how long they have to act, and Anchor handles all updates in real time.



Tiered packages & optional services: Reinforce your base rates while giving clients flexible options. Combined with conditional discounts, tiers can include their own incentives, making the value (and deadline) crystal clear.



Enhanced proposals & seamless payments: Once a client accepts, Anchor processes the payment automatically using the connected ACH or credit card on file, so cash collection runs without follow-ups.

FAQs

Isn't this just discounting?

No. They're planning incentives, not permanent discounts. Set your standard rate, and clients who commit by the deadline get preferred pricing. Everyone else pays standard rates.

How early should we launch the campaign?

Most firms publish pricing and incentives in the fall, but if it's already January, set a deadline 10–21 days out and tie it to capacity (priority window, earlier delivery, or locked-in scope).

What happens when incentive dates pass?

Anchor handles it automatically. Expired discounts are removed, standard pricing kicks in, updates are applied instantly, and clients always see up-to-date pricing in their proposals.

Can we customize incentives for different clients?

Yes. You can segment by client type, service, or revenue band and adjust windows and incentive levels without changing the overall workflow.

What's the most significant benefit besides cash flow?

Predictability. You start tax season with revenue secured, capacity planned, and far fewer last-minute requests eating into unbillable time.

Plan 3: Lock in certainty, protect your time from unbillable work, & Grow your (profitable) revenue

Turn once-a-year tax work into stable, recurring revenue all year.

The “year-round” plan.

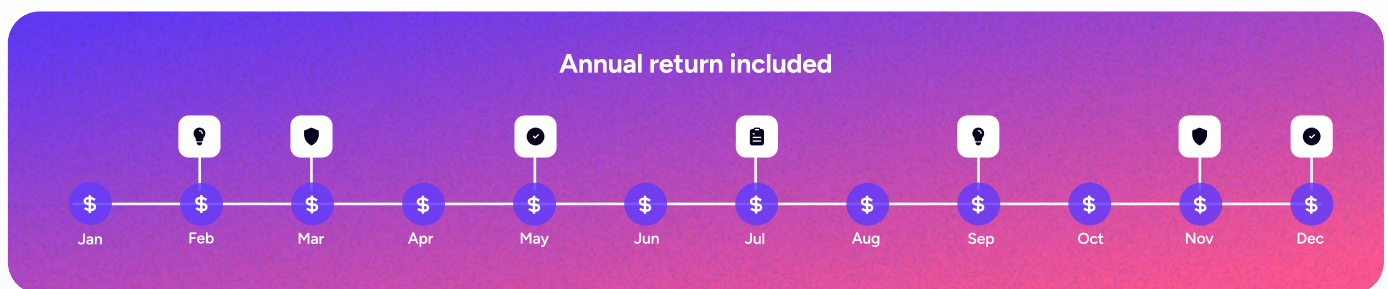
If you're ready to move beyond the peaks and valleys of tax season, this action plan transforms one-time engagements into consistent, year-round income. It's how forward-thinking firms stabilize their monthly recurring revenue, strengthen client loyalty, and turn tax season from a sprint into a steady, scalable cycle.

“Our journey into subscription billing with the team support has been a major shared win. In fact, I don't think I would have made the leap if it weren't for Anchor.”

Trevor McCandless, CEO, [Fusion CPA](#)

What: Turn annual tax work into a year-round revenue stream.

Instead of collecting once a year, move clients onto subscription-style [monthly or quarterly bundles](#) that keep them engaged and paying consistently throughout the year.



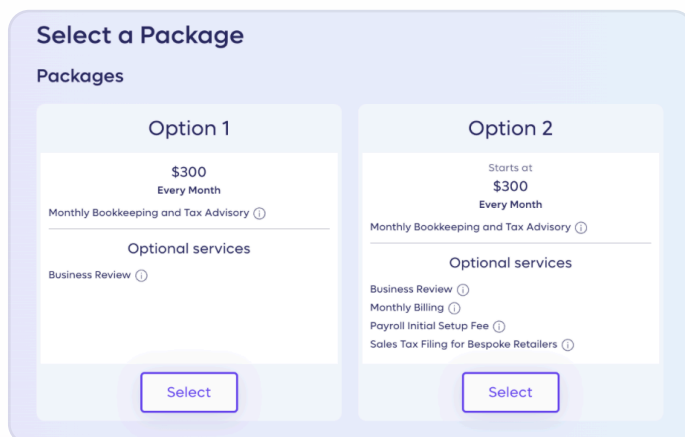
Each bundle includes the annual return and add-ons that clients value, such as:

- Audit protection and IRS correspondence support
- Extension filing and compliance monitoring
- Priority or accelerated filing options
- Prepaid planning time (for example, quarterly or on-demand sessions)
- Pre-approved hours for ad-hoc work, with client authorization above set limits
- Owner 1040s attached to business engagements as optional add-ons

These inclusions protect your time from unbillable work, reduce last-minute chaos, and generate ongoing revenue while providing clients with proactive, continuous support.

How: Create and automate recurring service bundles.

Start by segmenting your clients into clear groups, such as individuals, small businesses, and advisory clients. Then design tiered packages tailored to each segment.



Build monthly or quarterly bundles that combine recurring services and add-ons clients value. Anchor automates renewals, billing, and approvals behind the scenes.

Price each bundle so that the annualized amount exceeds your one-time engagement. For example, if a one-off tax engagement is \$2,400, price your bundle around \$300 per month. The goal isn't to discount, but to convert lumpy tax-season revenue into predictable MRR and increase long-term value per client.

Once set up, Anchor automates the whole cycle. Proposals renew annually, payments run automatically monthly or quarterly, and clients see a clear breakdown of what's included.

When scope changes, you update the agreement, and Anchor routes it through the same approval flow, so renewals, amendments, and billing all run in the background. Your team no longer needs to reissue invoices or chase renewals, and the system just keeps going.

Why it works.

Monthly or quarterly bundles eliminate uneven cash flow and reduce client churn. Smaller, recurring payments improve client cash flow while creating predictable, month-in, month-out income for your firm. You replace seasonal peaks and valleys with steady revenue and a calm, ongoing workflow.

Bundling in planning time, support, and add-ons up front also helps keep scope creep and "quick questions" from becoming unbillable work.

This approach strengthens relationships. Clients who receive continuous support are less likely to switch providers or delay renewals. You move from transactional service to trusted year-round advisor, building loyalty and expanding wallet share over time.

Best for:

Firms that are ready to move beyond seasonal income and build a stable, subscription-based client base. This works best for business clients, high-income individuals, and advisory-heavy practices (or practices expanding into advisory services) that value year-round touchpoints and proactive support.

If your long-term goal is to make tax season a stable chapter in a wider, strategically planned year, with higher average client value and predictable MRR, this is your play.

"Anchor makes it so quick and easy to send proposals to new prospects. I now have things set up so that I can send a proposal within minutes of getting off a dDiscovery call instead of needing to schedule time to create and send a proposal sometime after the call. I love it!"

Ellen Oliver, Firm Owner

Enablers



Bulk proposals: Roll out new subscription bundles across clients instantly, or start with a targeted group such as business or advisory clients.



Instant payments: Payment details are collected and stored securely during approval, so cash arrives on schedule.



Optional services: Offer à la carte upgrades clients can self-select online, from planning sessions to priority support, increasing average client value.



Automatic invoices: Generate and send recurring invoices from approved agreements, automatically.



Interactive agreements and compliant amendments: Update recurring agreements automatically as plans or pricing change.

FAQs

How do clients respond to monthly pricing?

Per our data, positively. Many clients prefer smaller, predictable payments with ongoing support included, rather than a single large annual bill.

Does this replace annual engagements?

Yes, but it also strengthens them. Each client remains under an active agreement that renews automatically with clear deliverables and value.

What if a client only wants annual service?

You can keep that option, but position the monthly bundle as the more intelligent choice. It spreads cost, locks in access, and ensures continuous support.

Isn't this more admin to manage?

Not with Anchor. Payments, renewals, amendments, and add-ons all run automatically, with no manual invoicing or chasing.

What's the long-term payoff?

Consistency. Monthly revenue balances your workload, stabilizes cash flow, and builds loyalty that compounds each year.

Ready to get started? Your 14-day launch plan is next.

Your 14-day launch plan

Go live within two weeks, without disrupting client work.

You don't need months to change your billing system. In ~4-6 hours over a span of two weeks, you can implement the plans top firms use to create their best tax seasons. Before you start, book a [15-minute call](#) with our team. We'll map your client list, plug in your pricing, and show you exactly how proposals, expirations, and payments run on autopilot.

Here's your step-by-step launch checklist, with a rough time commitment for each phase:

Days 1–3: Set your strategy



Review last tax season to identify where time was lost, where work went unbilled, and where collections lagged.



Confirm your 2026 pricing and choose which action plan or blend of plans you want to roll out.



Decide how you will structure payments across your client base, whether through milestones, early-action incentives, or monthly/quarterly bundles.



Share your client list, service catalog, and current agreements with the Anchor team so setup can begin immediately in the background.

By day three, you'll have a clear pricing structure, a defined rollout strategy, and a complete list of services to include in your proposals. **Your time commitment:** about 1–2 hours.

Days 4–7: Build your foundation



Anchor's Customer Success team completes your setup by importing your client data, services, pricing, and agreements for you. No effort required on your end.



Create or update your proposal templates, complete with auto-expiring incentives, add-on options, and clear payment structures.



Set your compliance defaults, including variable pricing ranges, amendment rules, consent requirements, and opt-out windows.

By the end of Week 1, your firm's data will be automation-ready. No spreadsheets, no cleanup, no setup friction. **Your time commitment:** about 60–90 minutes to review and approve templates and settings.

Days 8–10: Prepare your send



Segment clients by service type or priority (individuals, business returns, advisory, etc.).



QA your proposal content, incentive timelines, optional services, and payment settings.



Schedule your bulk proposal send for your next workable window, even if the season has already ramped up.

By day 10, you'll be ready to hit "send" and start collecting commitments immediately.
Your time commitment: about 30–60 minutes to review segments and schedule the send.

Days 11–14: Launch & optimize



Send all proposals at once using Anchor's bulk send feature.



Monitor real-time dashboards to track signed, pending, and paid engagements.



Follow up with clients who lapse after each incentive window, either automatically or with a personal touch.

By day 14, your early-commitment system will be live, collecting revenue and locking in client capacity for 2026.
Your time commitment: about 30–60 minutes to review results and fine-tune.

FAQs

Do we really go live in two weeks?

Yes. Most firms are fully operational within 10–14 days. Anchor's Customer Success team handles the data import, proposal setup, and automation so you can focus on pricing, segmentation, and rollout.

What if we're still finalizing our pricing?

That's fine. Start with your draft rates and update as you go. Anchor's proposal templates and pricing ranges make it easy to adjust without slowing the launch or redoing work.

Is this too close to tax season to make changes?

Not at all. Even if you're weeks away from peak season, small adjustments now can still change how the rest of the season feels.

Can we start with one plan and add the others later?

Absolutely. Many firms begin with a single action plan (often plan 2 for early commitments) and then layer in milestone billing or monthly/quarterly bundles once the foundation is live.

What kind of support do we get during setup?

You'll work directly with Anchor's onboarding specialists. They'll import your client data, build proposal templates, test payment logic, and make sure you're ready to send bulk proposals by day 10, and go live by day 14.

📅 Why now?

Tax season is underway.



Now is the perfect time to implement these changes and prevent the coming weeks from running you.

Implement these action plans in the next two weeks, and you'll:

- **Enter peak busy season** with cash already collected.
- **Finalize staffing** and scheduling with confidence.
- **Eliminate** the late-season payment scramble.
- **Set a new, calmer rhythm** for your entire firm.

Miss this window, and you're right back in reactive mode, with another chaotic tax season on your doorstep.

Act now, and you can lock in certainty, protect your time from unbillable work, and grow your profitable revenue for 2026 and beyond.

Which plan (or blend of plans) will you choose?

	Plan 1 (Core)	Plan 2 (Advanced)	Plan 3 (Pro)
Goal	Lock in certainty	Lock in certainty + Protect your time from unbillable work	Lock in certainty + Protect your time from unbillable work + Grow (profitable) revenue
Core benefit	Remove billing guesswork so you get paid on time, every time.	Pull cash forward and protect your time.	Turn once-a-year tax work into stable, recurring revenue all year.
How	Choose between two simple billing structures.	Incentivize early payment and offer optional add-ons.	Stable monthly revenue with embedded CAS offering.

Set a new, calmer rhythm for your firm.

See how your firm can thrive, even during busy season.

You're in the early stretch of tax season, and the next few weeks will have a major impact on how it all plays out.

The firms that thrive during their busiest moments are those that prepare for them, locking in renewals, automating billing, and setting up predictable cash flow. Will it be another sprint filled with late nights and uncertainty, or will you have systems in place so you can run tax season on your terms? The answer depends on your next move.

Start today by scheduling a 15-minute call with one of our advisors. If you're wondering about pricing or expected costs, Anchor has **no monthly subscription fee**. You pay a simple \$5 flat fee per payment received, and that's it. No hidden add-ons or setup costs.

Everything else, including unlimited proposals, automated billing, and full support, is included.

In less than two weeks, you'll be fully ready with your selected action plan(s). Once everything's in motion, you'll wonder why you didn't get started sooner.



👉 **Your next step:**

📞 **[Book a 15-minute setup call today](#), and start building your best tax season yet.**