

MARKETING, GROWTH, AND PROFESSIONAL DEVELOPMENT

Master Study Guide

Review these notes before taking the Module 8 quiz. Focus on trustworthy positioning, marketing messages, visibility, referrals, privacy, compliant claims, and professional growth.

Lesson 8.1 — Build A Trustworthy Position

The strongest tax marketing promise is a clear and accurate process, not a promise of a maximum refund.

A trustworthy position emphasizes careful intake, plain-language explanations, secure document handling, transparent pricing, and dependable follow-up.

Choose a specific audience without unlawfully excluding people. Examples include first-time filers, working families, self-employed service providers, gig workers, retirees, and local small-business owners.

Build educational content around the real problems the chosen audience faces.

Lesson 8.2 — Your Marketing Message

Use three content categories: Education, Trust, and Invitation.

Education content can explain documents, deadlines, recordkeeping, credits, common mistakes, and new tax-law changes.

Trust content can show the intake process, security practices, professional development, community involvement, and client-service standards.

Invitation content should tell the audience how to book, what to bring, who the service is for, and what happens next.

Lesson 8.3 — Local And Digital Visibility

Offline visibility can include permitted flyers, community workshops, partnerships, sponsorships, networking events, and educational sessions. Obtain permission for signs and follow local rules.

Digital visibility can include a complete Google Business Profile, professional website, short educational videos, email education, local search content, and consistent social posts.

Protect taxpayer confidentiality in every channel. Do not post a return, refund amount, client document, testimonial, or client image without appropriate written permission and privacy review.

A useful weekly rhythm can include education, FAQs, process/security content, myth-correction videos, appointment invitations, and community or brand stories.

Quality and accuracy matter more than posting volume.

Lesson 8.4 — Referrals, Giveaways, & Testimonials

Referral programs and giveaways must comply with federal tax-practice rules, state law, platform rules, banking-partner rules, and professional licensing rules.

Do not tie prizes or referral rewards to inflated refunds, false claims, or disclosure of taxpayer information.

State the eligibility period, prize, selection method, restrictions, and whether a purchase is necessary.

Ask for reviews based on service, communication, and professionalism. Do not instruct clients to publish private tax facts.

Never create fake reviews or hide a material relationship with an endorser.

Lesson 8.5 — Taxpayer Information

IRC section 7216 and related regulations restrict a preparer's use and disclosure of tax return information.

Information provided for tax preparation does not automatically authorize unrelated marketing use, upload to an advertising platform, or disclosure to a third-party marketer.

Use only information and lists permitted by law and obtain compliant written consent when required.

Review third-party software and automation tools before connecting client data.

Do not upload a tax-client list to social-media custom audiences without specific legal and privacy review.

Do not place taxpayer details into public AI tools or send mass messages that reveal that a recipient is a tax client.

Lesson 8.6 — Claims To Avoid

Avoid claims such as 'Guaranteed maximum refund,' 'IRS certified' when only holding a PTIN or AFSP Record of Completion, 'We can get anyone \$10,000,' 'Instant IRS refund' for a bank-issued loan, and broad claims that all overtime or tips are tax-free.

Do not use misleading countdown pressure or testimonials that imply every client will receive the same outcome.

Safer language focuses on identifying lawful credits and deductions supported by facts, performing accuracy and documentation reviews, and explaining that refund timing and amounts depend on the return, IRS processing, offsets, and verification.

Use 'AFSP - Record of Completion' only when it is currently earned and valid.

Lesson 8.7 — Professional Development And Growth

Continuing education helps protect both the tax practice and its clients.

Stay current with tax-law changes, new forms, e-file procedures, security practices, and professional standards.

Use current IRS publications, form instructions, and authoritative sources. Document research questions and answers and apply tax-year labels to research notes.

As the business grows, maintain written policies, train staff consistently, monitor quality, track performance, and review results.

A successful tax practice grows from accuracy and consistency, not volume alone.