



# Scalable Tax Planning Pod Model

A repeatable advisory system engineered to scale predictably, deliver consistent client outcomes, and build durable recurring revenue — without burning out your team.

EXECUTIVE DECK

# Executive Overview

The Pod Model is a structured, scalable framework designed to solve four core growth challenges simultaneously.



## Scale Without Burnout

Distribute workload across specialized roles so no single person carries the full load.



## Ensure Implementation

Dedicated EAs guarantee strategies are actually executed — not just delivered.



## Build Recurring Revenue

Annual maintenance cycles lock in retention and create predictable cash flow.



## Grow Through Pods

Replicate the model pod by pod — each one multiplying revenue capacity.

📌 **Core Strategy:** Build → Cap → Maintain → Duplicate Pods

# Standard Pod Structure

Each pod is built around five specialized roles — designed for clarity, accountability, and maximum throughput.

## 1 Salesperson

- 1 Runs 9 discovery calls/week. Handles qualification and closing. Shared across pods in early stages.

## 2 Strategist

- 2 Builds tax strategies, delivers planning calls, owns client relationships, and leads mid-year and year-end advisory calls.

## 3 EA #1 & EA #2

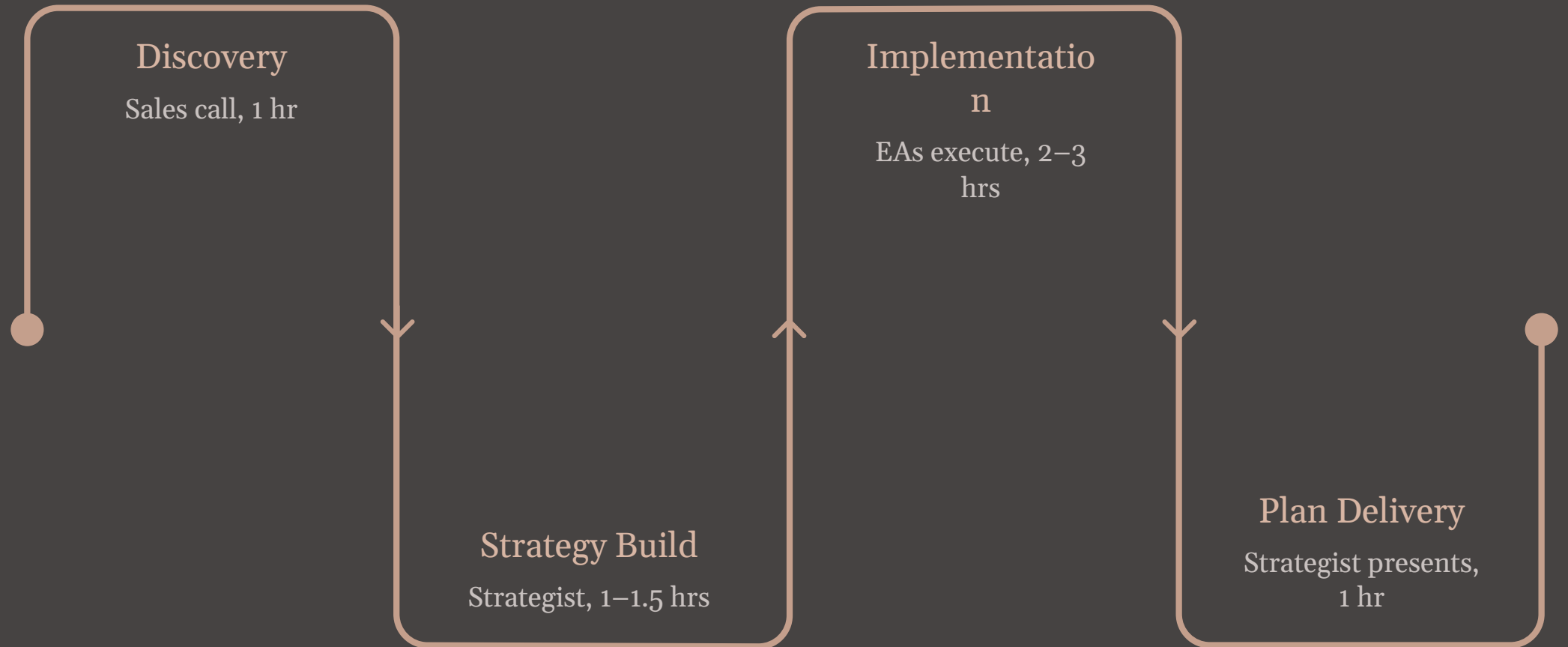
- 3 Both execute implementation workflows — Augusta Rule, Accountable Plans, S-Elections, Reasonable Compensation Reports.

## 4 Admin / Workflow Manager

- 4 Assigns tasks, tracks client progress, schedules calls, and maintains the pipeline to prevent bottlenecks.



# Client Workflow: New Client Flow



Every new client moves through a standardized four-step sequence — ensuring quality, consistency, and accountability across the entire engagement.

# Ongoing Maintenance Cycle

Retention is engineered through a structured annual touchpoint system. Each client receives two dedicated advisory calls per year, supported by EA maintenance updates and admin scheduling — keeping relationships active and revenue recurring.



## Mid-Year Call

May – July · 1 hr per  
client

## Year-End Call

Nov – Dec · 1 hr per client

## Maintenance Updates

EAs handle ongoing  
implementation  
adjustments

## Scheduling & Workflow

Admin coordinates all  
touchpoints seamlessly

# Workload Distribution

Each role is sized to operate at a sustainable pace — protecting quality and avoiding burnout across the pod.

40–45

Strategist hrs/week

Strategy builds, delivery & maintenance calls, team leadership

30–34

Sales hrs/week

9 discovery calls/week, follow-ups, lead nurturing

28–30

Each EA hrs/week

Implementation, maintenance workflows, reasonable comp reports

30–35

Admin hrs/week

Task assignment, scheduling, workflow tracking

# Client Capacity Model

Pod Client Cap

# 120–150

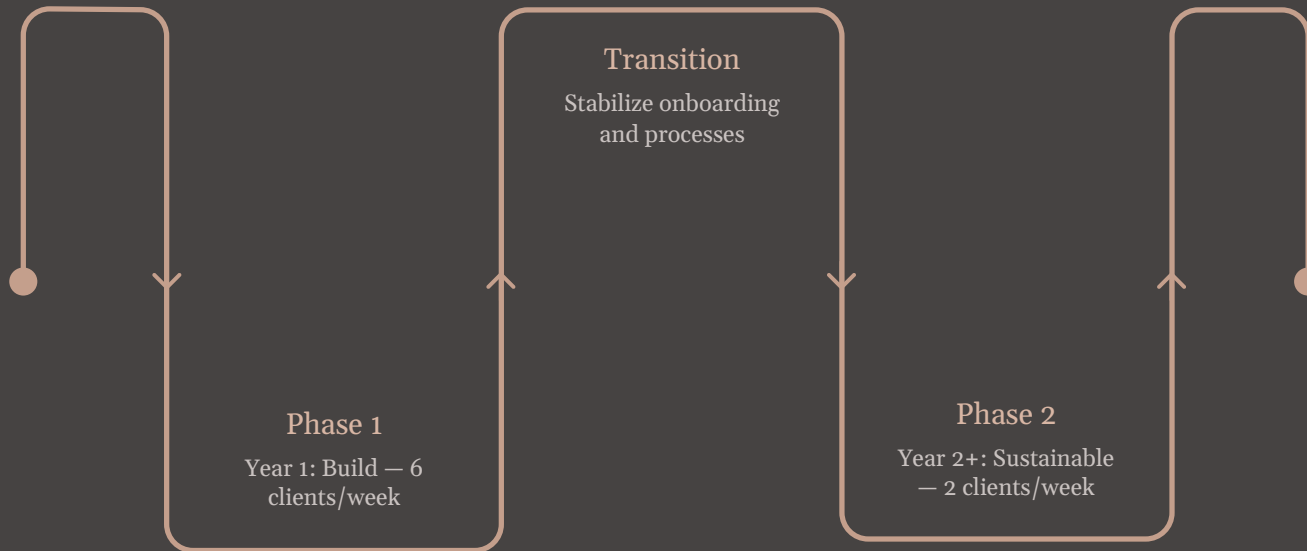
Clients per pod — the recommended ceiling for sustainable, high-quality service delivery.

## Why the Cap Matters

- **Protects service quality** — every client receives consistent, thorough attention
- **Prevents team overload** — workloads stay within sustainable targets
- **Maintains retention** — satisfied clients renew, driving compounding revenue



# Intake Strategy: Building to Capacity



## Why It Works

**Year 1** prioritizes rapid pod fill — onboarding ~6 clients per week to reach capacity quickly and establish recurring revenue momentum.

**Year 2 and beyond** shifts to a sustainable ~2 clients per week — replacing natural churn, growing the base, and keeping the team operating without strain.

- This pacing keeps revenue growing predictably without sacrificing delivery quality or team wellbeing.

# Cost Structure Per Pod

## Annual Team Labor

Role	Annual Cost
Strategist	\$165,000
EA/accountant #1 ( Argentina)	\$60,000
EA/accountant #2 ( Argentina)	\$60,000
Admin / Workflow Manager ( Argentina)	\$45,000
Sales (shared allocation)	~\$80,000
<b>Total Labor</b>	<b>~\$415,000</b>

## Total Pod Cost (with Overhead)

Adding a **25% overhead factor** — covering software, tools, licenses, and administrative infrastructure — brings the total annual pod cost to:

~\$519,000

per pod per year

- ❏ Overhead includes CRM, tax planning software, workflow tools, and miscellaneous operational expenses.

# Revenue Model: Year 1 — Build Phase

## Year 1 Revenue

150 Clients × \$10,000

**\$1,500,000**

Gross Revenue

## Year 1 Net

**~\$981,000**

After total pod cost of ~\$519,000

## What Drives Year 1

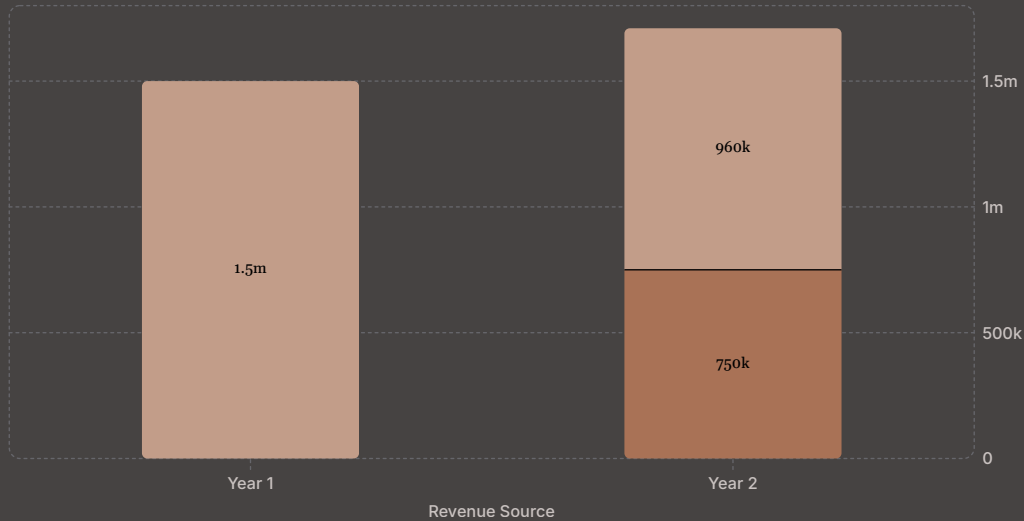
The build phase focuses on onboarding new clients at the full **\$10,000 planning engagement fee** — maximizing revenue per seat as the pod fills to capacity.

- Full-fee new client engagements drive top-line growth
- Pod reaches capacity by end of Year 1
- Renewal base is established for Year 2 compounding



# Revenue Model: Year 2 — Renewals + Growth

Renewals New Clients



## Year 2 Revenue Breakdown

- **Renewals:** 150 clients  $\times$  \$5,000 = \$750,000
- **New Clients:**  $\sim 96 \times$  \$10,000 = \$960,000

## Total Revenue

**\$1,710,000**

**Net:  $\sim$ \$1,191,000** after pod costs

- ❑ Renewal revenue at \$5,000 per client represents high-margin, low-effort income — the engine of long-term profitability.

# Compounding Growth: Year 3+

## Year 3 Revenue Model

Source	Amount
Renewals (246 clients × \$5,000)	\$1,230,000
New Clients (96 × \$10,000)	\$960,000
<b>Total Revenue</b>	<b>\$2,190,000</b>
Pod Cost	~\$519,000
<b>Net Revenue</b>	<b>~\$1,671,000</b>

- ❑ Revenue compounds annually as the renewal base grows — each retained client adds high-margin income with minimal additional effort.



# Scaling Pods: 1 → 3

Each pod is a self-contained revenue engine. Duplicating the model multiplies capacity — without reinventing the system.



Year 1

**1 Pod**

\$1.5M Revenue



Year 2

**2 Pods**

\$2.25M+ Revenue



Year 3

**3 Pods**

\$3M+ Revenue

The shared salesperson model controls costs during early scaling — a single sales resource supports multiple pods until each warrants dedicated coverage. Each new pod added multiplies total revenue capacity while leveraging the same proven system.