

## Homepage Bio

*Note: 40 words, about 250 characters*

### Header

Let's make tax accounting fun.

### Copy

I'm Jessica. I'm not your typical tax accountant... I'm an Enrolled Agent with **more than a decade of experience**. I help overwhelmed entrepreneurs manage their finances so they can focus on running their business. My holistic approach brings big wins and increases profits for my beloved clients.

### Call to Action

[More About Me](#)

# Welcome Email

## Subject

Welcome! Here's what to expect

## Copy

Hi there! I'm so excited to be the official tax-savvy lady in your life.

Thanks so much for signing the contract and submitting your deposit. I promise to give you my best work, but in order to do so, I need some things from you. This email contains important info on what to expect, how to communicate with me, and instructions for our portal.

Make sure to read and save this email!

## Communication

Excellent communication is key for a solid relationship. My working hours are Monday through Friday, 8AM through 5PM PST. Any time you reach out to me, I will reply to your message within 2 business days.

We'll be communicating primarily via the client portal. It is a secure, intuitive space to exchange documents and send messages. You may also have access to me via email, text message, phone, or a priority Slack channel. Keep in mind: *the most secure way to send confidential information is through the client portal.*

## Client Portal Tutorial

Please watch this short, 3-minute video where I walk you through the client portal.

Client Portal Instructions

## Next Steps

Your next step is to [log in to the portal](#) to view your pending tasks. (You received a separate email from me to set up your login and password.) You may need to upload certain documents or schedule a follow-up call with me.

Tax Savvy Jessica - Homepage Bio and Emails  
Copy Document August 2020

Thanks again, and please send any questions you have!  
Jessica

## Closing Email

### Subject

So what did you think?

### Copy

Hey there!

I'm so happy I was able to help you with your accounting question. Giving advice is one of my favorite things to do.

Can you do me a favor? Please leave a review of your experience with me on Facebook. It would mean so much to me!

[Leave A Review](#)

I'd love to help you some more, too. I have a special offer for you: I'm now offering a mid-year financial health review. This is the perfect opportunity to see where your business stands financially—before the craziness of tax season starts. If you're interested, please set up an appointment with me!

See you around!  
Jessica