

# Case Study 2: Priya — Doubling Income with Strategy Stacking

## Background

Priya had been running her tax business for years, primarily focused on preparation with a few side consulting projects. Her average client bill ranged from \$400–\$600, and she had a loyal but limited client base. She knew she should be doing more advisory work but struggled with three critical barriers: no structured way to sell planning, no consistent demand, and competitor noise from social media influencers positioning themselves as “strategists.”

## Before Uncle Kam



### Revenue Plateau:

Earning ~\$12,000/quarter, almost entirely from tax prep fees.



### Pricing Ceiling:

Couldn't justify charging beyond \$1,000 — no deliverable to back it up.



### Inconsistent Pipeline:

Referrals were hit-or-miss and mostly wanted low-cost prep work.



### Coaching Fatigue:

Frustrated by programs that gave “tools without clients” and vague promises.



“I tried two other coaching programs before Uncle Kam. They taught me concepts but never gave me actual clients or a deliverable I could charge \$3,000+ for. I was stuck.” — Priya  
— Priya

## After Joining Uncle Kam

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Within her first 90 days on Uncle Kam, Priya received high-intent taxpayer leads directly from the platform's round-robin system. These weren't bargain shoppers — they were motivated prospects actively seeking tax savings.

Using the AI Tax Plan Builder, Priya stacked multiple strategies — entity structuring, QBI optimization, retirement planning — into personalized tax plans. Instead of pitching one-off deductions, she presented cohesive strategies worth thousands per engagement. Her quarterly revenue jumped from \$12K to \$25K.

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## How Uncle Kam Was Different

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### Clients First:

Uncle Kam put qualified leads on Priya's calendar immediately — not "someday."

### Deliverables That Sell:

AI Tax Plan Builder generated polished, client-ready plans with IRS code references and savings projections.

### Confidence to Charge:

Leads + AI tools + pricing support positioned her as a strategist, not a commodity.

### Proof Over Promises:

Real results in 90 days, not vague timelines or "figure it out yourself."

## The Transformation

**Before:** ~\$12K/quarter, mostly prep fees, couldn't price beyond \$1,000.

**After:** \$25K/quarter in advisory-driven revenue within 90 days.

**ROI:** More than 4X return on platform investment.

**Future-Proof:** Advisory is now the core of her business — not an afterthought.



"The difference with Uncle Kam was night and day. Other programs told me what to do, but Uncle Kam actually gave me the leads, the deliverables, and the confidence to sell. I doubled my income in one quarter."

— Priya

## Ready to Transform Your Practice?

Join Uncle Kam and start closing advisory clients this week.

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