

# Case Study 3: Marcus — Part-Time Hours, Full-Time Revenue

## Background

Marcus was a full-time operations manager at a logistics company, running a small tax prep practice on the side. He loved the work but couldn't justify going full-time — the math didn't add up with prep fees alone. He was doing 60 returns per season at \$350 average, netting about \$21K for four months of intense work. The rest of the year? Radio silence from clients.

## Before Uncle Kam



### Time-Starved:

Could only work evenings and weekends — 15–20 hours max per week.



### Seasonal Income:

All revenue compressed into January–April, then nothing.



### Volume Trap:

More returns meant more hours he didn't have — no way to scale.



### Low Per-Client Value:

Averaging \$350/return with no upsell path or recurring revenue.



"I was doing 60 returns a season and barely clearing \$21K. I knew advisory was the answer, but I didn't have 40 hours a week to figure it out. I needed something that worked in the time I actually had." —

Marcus

— Marcus

## After Joining Uncle Kam

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Marcus realized advisory work was the perfect fit for his schedule. Unlike prep (which requires gathering documents, filing deadlines, and volume), tax planning could be done on his timeline with fewer, higher-value clients.

He joined Uncle Kam and within 60 days had his first three advisory clients — each paying \$2,500–\$3,500 for quarterly planning engagements. The AI Tax Plan Builder meant he could generate a comprehensive plan in 20 minutes instead of spending hours on research. By month four, he had 6 advisory clients generating \$9K/month.

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## How Uncle Kam Was Different

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| <b>Time Efficiency:</b>             | AI generates comprehensive plans in 20 minutes vs. hours of manual research. |
| <b>Year-Round Revenue:</b>          | Quarterly retainers replaced the seasonal prep spike with consistent income. |
| <b>Higher Per-Client Value:</b>     | \$2,500–\$3,500 per client vs. \$350 prep fees — 10X per engagement.         |
| <b>Scalable Without More Hours:</b> | Better clients, not more clients — perfect for part-time schedules.          |

## The Transformation

- Before:** \$1,750/month annualized, seasonal only, part-time grind.
- After:** \$9,000/month year-round, still working just 15 hours/week.
- ROI:** 5X monthly income increase without adding hours.
- Future-Proof:** On track to replace his day job salary entirely within 12 months.



"I didn't quit my day job to make this work. I just replaced my prep grind with advisory clients who pay 10X more per engagement. Uncle Kam's AI does in 20 minutes what used to take me a full weekend of research."

— Marcus

## Ready to Transform Your Practice?

Join Uncle Kam and start closing advisory clients this week.

[Book Your Strategy Session](#)

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