

Case Study 4: Ellie — First Tax Plan Sold in 72 Hours

Background

Ellie had just earned her EA designation and was eager to move beyond basic 1040 prep. She'd heard about tax planning as a service but had no idea how to package it, price it, or find clients who would pay for it. Every coaching program she looked at wanted \$5K–\$15K upfront with vague promises of “eventually” building a practice. She needed something that worked immediately.

Before Uncle Kam



Zero Advisory Experience:

Brand new to planning — had never sold a tax strategy engagement.



No Advisory Client Base:

Her prep clients were low-income and not candidates for planning.



Overwhelmed by Complexity:

Building plans from scratch felt impossible without years of experience.



Skeptical of Programs:

Burned by coaching promises of “6–12 months to first client.”



“Every program I looked at wanted \$10K upfront and told me I’d ‘eventually’ get clients. I couldn’t afford to wait 6 months hoping something would work. I needed proof fast.” — Ellie

— Ellie

After Joining Uncle Kam

Ellie joined Uncle Kam on a Monday. By Tuesday, she'd completed the onboarding and had access to the AI Tax Plan Builder and the lead marketplace. On Wednesday morning, a qualified lead — a small business owner looking for entity restructuring advice — appeared on her calendar.

She used the AI to generate a comprehensive plan covering S-Corp election, reasonable compensation analysis, and retirement plan optimization. The plan included IRS code references, projected savings, and implementation steps. She presented it Wednesday evening. The client paid \$3,200 on the spot.

How Uncle Kam Was Different

- Instant Lead Access:** Qualified prospects on her calendar within 24 hours of joining.
- AI Does the Heavy Lifting:** No need to manually research strategies or build plans from scratch.
- Professional Deliverables:** Client-ready plans with IRS references that justify premium pricing.
- Zero Ramp-Up Time:** From signup to paid client in 72 hours — not 6–12 months.

The Transformation

- Before:** \$0 advisory revenue, zero experience, skeptical of programs.
- After:** \$3,200 first engagement closed in 72 hours.
- ROI:** Immediate ROI on platform investment — paid for itself day one.
- Future-Proof:** Now averaging 3–4 advisory clients/month at \$2,500–\$4,000 each.



“I signed up Monday and had a paid advisory client by Wednesday night. The AI built the plan, the marketplace brought the client, and Uncle Kam gave me the confidence to charge \$3,200. This is what other programs promise in 6 months — I got it in 3 days.”

— Ellie

Ready to Transform Your Practice?

Join Uncle Kam and start closing advisory clients this week.

[Book Your Strategy Session](#)

unclekam.com/become-a-tax-pro

UNCLE Kam pros