

Case Study 5: Derek — Solo EA — From Compliance Grind to \$140K Practice

Background

Derek had been a solo Enrolled Agent for six years. He was meticulous, thorough, and his clients loved him. But he was trapped in the compliance cycle: 70-hour weeks from January through April, then scrambling for bookkeeping clients the rest of the year just to keep the lights on. His annual revenue had plateaued at \$85K, and he was exhausted.

Before Uncle Kam



Feast-or-Famine Cycle:

70% of revenue compressed into 4 months — then scrambling the rest of the year.



Price Competition:

Competing on price with H&R Block, TurboTax, and discount preparers.



Perceived as a Filer:

Clients viewed him as a “tax filer” not a strategist — limiting his value.



No Advisory System:

Knew advisory was profitable but had no system to package or sell it.



“I was working 70-hour weeks during season and barely making \$85K a year. My clients liked me, but they only called once a year to file. I knew I was worth more — I just didn’t know how to prove it.” — Derek

— Derek

After Joining Uncle Kam

Derek's turning point was realizing he already had the expertise — he just didn't have the system to monetize it. After joining Uncle Kam, he started offering tax planning to his top 30 existing clients using the AI Tax Plan Builder.

The AI generated personalized plans showing each client exactly how much they could save with entity restructuring, retirement optimization, and income timing strategies. 12 of his 30 existing clients said yes to advisory engagements at \$2,500–\$5,000 each. The marketplace then brought him 8 additional advisory-only clients over the next 6 months.

How Uncle Kam Was Different

- Existing Client Upsell:** AI made it easy to show existing clients exactly what they were missing.
- Year-Round Revenue:** Advisory retainers eliminated the seasonal drought completely.
- Work-Life Balance:** Fewer hours, higher revenue per hour — 45 hrs/week vs. 70.
- Professional Repositioning:** Went from "tax filer" to "tax strategist" in his clients' eyes.

The Transformation

- Before:** \$85K/year, 70-hour weeks, seasonal, burned out.
- After:** \$140K/year, 45-hour weeks, year-round revenue.
- ROI:** 65% revenue increase with 35% fewer hours worked.
- Future-Proof:** 40% of revenue now comes from advisory — growing every quarter.



“I was working 70-hour weeks and making \$85K. Now I work 45 hours, make \$140K, and my clients actually respect me as a strategist. Uncle Kam’s AI let me show my existing clients what they were leaving on the table — and 40% signed up on the spot.”

— Derek

Ready to Transform Your Practice?

Join Uncle Kam and start closing advisory clients this week.

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