

# Case Study 6: Sandra — CPA Firm Owner Adds \$60K Advisory Stream

## Background

Sandra owns a small CPA firm with two staff members. After 15 years in the business, she'd built a solid \$380K practice — but it was all compliance. Every year was the same grind: overwhelmed January through April, then slow May through December. Her staff was burned out, margins were shrinking as clients price-shopped, and she knew advisory was the answer but couldn't figure out how to productize it.

## Before Uncle Kam



### Knowledge Bottleneck:

Advisory knowledge lived in Sandra's head — couldn't delegate it to staff.



### Staff Underutilized:

Team trained for compliance only — idle 60% of the year outside tax season.



### No Scalable Deliverable:

No product or system that justified \$3K-\$7K advisory fees.



### Fear of Disruption:

Worried about cannibalizing existing client relationships with new offers.



"I knew advisory was more profitable, but I couldn't be the bottleneck on every engagement. My staff could do compliance — but advisory? That required me. I needed a system they could run." — Sandra — Sandra

## After Joining Uncle Kam

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Sandra's breakthrough was realizing she didn't need to be the only person delivering advisory. Uncle Kam's AI Tax Plan Builder gave her staff a repeatable system: input client data, generate a comprehensive plan, present it with confidence.

She started by offering planning to her top 20% of clients (highest revenue, most complex situations). The AI-generated deliverables — complete with IRS code references, savings projections, and implementation timelines — made the \$3K-\$7K price tag feel like a no-brainer. 18 clients signed up in the first quarter alone.

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## How Uncle Kam Was Different

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- Delegatable System:** Staff could generate and present plans without Sandra's direct involvement.
- Existing Client Revenue:** No new marketing needed — upsold existing relationships for \$60K.
- Off-Season Productivity:** Advisory work filled the May-December gap — staff utilized year-round.
- Margin Improvement:** Advisory at 80%+ margins vs. 40% on compliance work.

## The Transformation

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- Before:** \$380K firm revenue, all compliance, seasonal, staff burned out.
- After:** \$440K firm revenue (+\$60K advisory) in 6 months, year-round.
- ROI:** \$60K new revenue with zero new hires or marketing spend.
- Future-Proof:** Staff now runs advisory independently — Sandra focuses on growth.



“The game-changer was that my staff could use the system — not just me. We added \$60K in six months without hiring anyone. My team actually enjoys the off-season now instead of dreading it.”  
— **Sandra**

## Ready to Transform Your Practice?

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