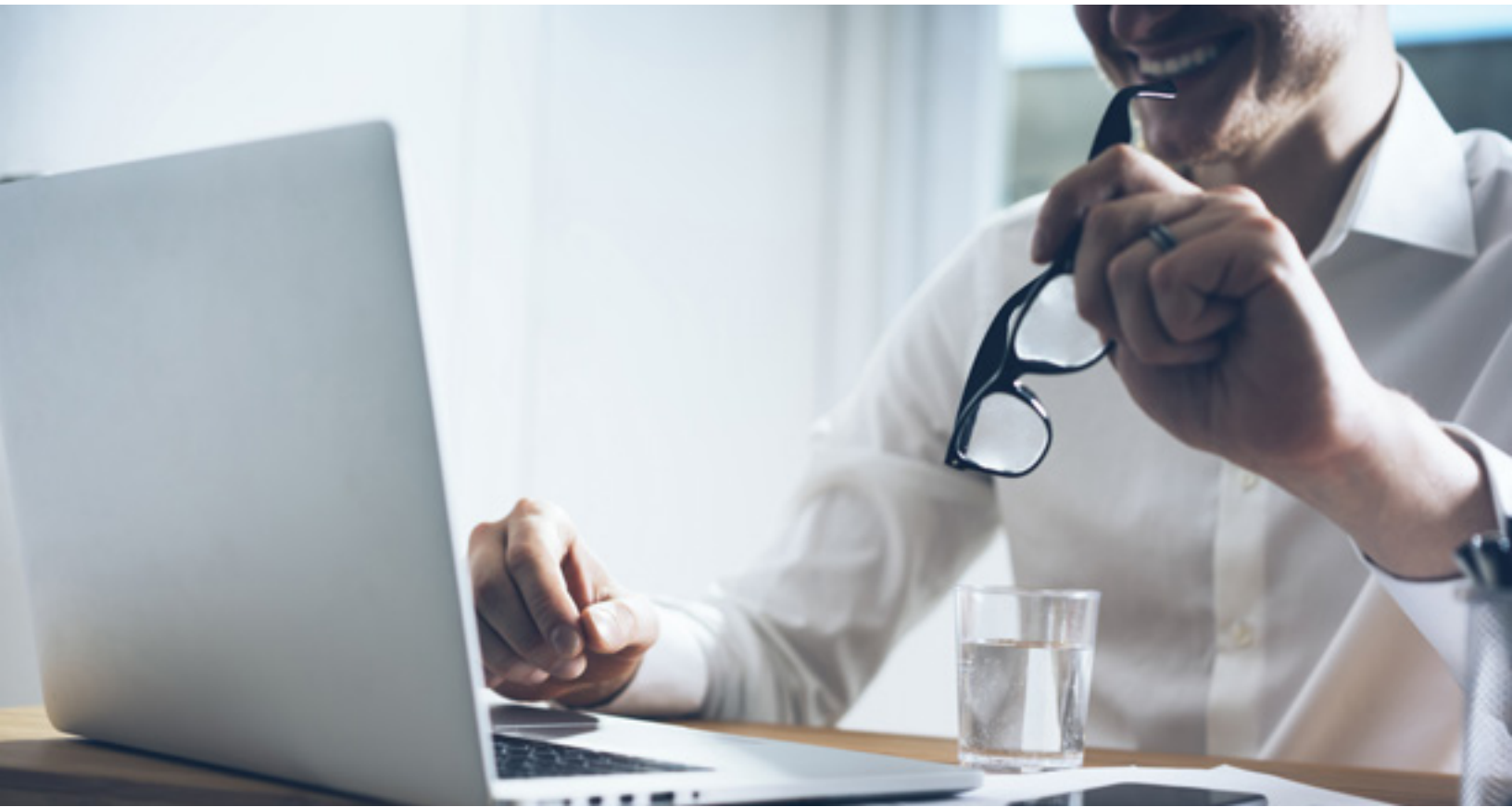


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CHECKPOINT™



Content Solutions **Checkpoint Marketing for Firms**

The World is Changing for Tax Practitioners

In the past, providing excellent service to clients seemed more straightforward. Now things like face-to-face meetings and answering questions are only a small part of what it means to meet your clients' needs. You have to keep up with constantly changing regulations. You need to find ways to market your firm and increase profitability. And you need to proactively communicate with clients in a way that resonates with them.



In the information age, clients expect to hear about important industry developments right away. And, as their trusted advisor, they expect to get these updates from you. If they don't, they may take their business elsewhere to someone who they feel is more proactive and can better keep up with the pace of today's world.

You need to stop addressing client needs reactively and start proactively educating them on industry changes and the full range of services you provide — while keeping your firm top of mind. One of the most widespread and effective ways to do this is via a healthy email, social media and web presence that promotes your firm's expertise and shares valuable industry news and tips. But that may seem like a tall order. Your firm likely doesn't have the skillset or time to come up with a steady stream of original content, and you'd need both to develop the quality and quantity of material necessary to be relevant and helpful to current clients and prospects.

This forces you to make a tough decision. To remain competitive, you can't afford to neglect content marketing. But you also can't afford to invest a significant amount of time or money into marketing your firm.



A 2016 report by Adobe found that **email drives more than 17% of sales** (even outranking display ads and social media).*

*Media Alert: Adobe Data Shows Black Friday Breaks Online Sales Record with \$3.34 Billion, November 26, 2016

Stay Ahead of the Marketing Curve

With content solutions from Checkpoint Marketing for Firms, you can:



Proactively nurture

your clients and prospects while opening up the door to additional business



Spotlight key partners

in your firm who specialize in niche areas



Educate your clients

on ancillary services that provide additional revenue to your firm

Our content is written by industry experts in categories chosen by former CPA partners that cover a wide range of in-depth topics. Easily update your communications with content available in many different distribution methods ranging from email newsletters and blasts to blogs and social media posts — plus a giant library of downloadable and customizable articles available in our content store. Just spend a few minutes customizing our pre-written content for use in speeches, presentations, emails, blogs, websites and more.

Solidify your reputation as a trusted advisor with regular, proactive client communication. Ensure that clients are aware of the full range of services you provide by sharing timely articles on those very topics. Increase revenue by getting ahead of those value-added conversations. Expand your client base and reach more prospects in a shorter amount of time by focusing less on one-on-one communications and more on timely one-to-many communications.

Position your firm for success now and in years to come with marketing solutions that take advantage of today's information-heavy climate.



Content Solutions With Tangible Results

Our mission is simple: to provide you with the tools you need to succeed. For more than 30 years, our client communication and marketing solutions have helped firms achieve their retention, growth and profitability goals. Written by professionals and vetted by experts, our solutions present your firm as the leading go-to resource and differentiate you from the competition. Plus, you'll get tangible, trackable results.



- **Newsletters** nurture clients for enhanced retention.
- **Articles** inform clients and prospects with a focus on specialized practice areas and industries.
- **Social Media Solutions** provides content, news, strategy and metrics for social media.





Bolster your thought leadership, develop long-term business relationships and maximize your business opportunities — all while helping to increase your firm's bottom line.

Digital and Print Newsletters

The key to effective newsletter marketing is the consistent delivery of engaging content that's timely and relevant to your target audience, pertinent to the services you offer and positions your firm as the place to go for expert advice on the topics discussed. When used effectively, newsletters are often the most productive devices in an accounting firm's marketing strategy. They nurture clients for enhanced retention and market to prospects and referral sources without costing valuable billable time.

Our newsletters come in multiple formats and feature a wide range of content and personalization options. All newsletters incorporate modern designs and brand-enhancing imagery while covering the topics that your network wants to know more about. These relevant, thought-provoking and actionable articles will encourage clients and prospects to reach out to your firm for additional guidance.

Choose from our multiple customizable newsletters according to your firm's specific needs. Mix and match from the following newsletter formats:



- **Email newsletters** — Best for timely messages to current clients, email newsletters are fast and cost effective to develop and send. They allow linking, social sharing and immediate and detailed tracking. Plus they're easy to forward and allow for quick and convenient responses.



- **Print newsletters** — Best for introducing your firm to prospects, impressing key contacts and presenting complicated information, print newsletters are tangible and can make a strong sensory impact. They can be handed out or inserted into mailers and other materials to boost distribution.



Articles

Increase prospect engagement by distributing actionable articles that inform on timely and topical issues while reinforcing your firm's area of expertise and ensuring you stay top-of-mind. Articles can be posted on your website, blog and social media pages; used in newsletters and marketing communications; emailed to clients, prospects and referrals; used to create speeches, presentations and handouts or sent in reply to information requests.

Choose from professionally-written, customizable articles ranging in length and spanning a wide variety of tax, accounting, business, legal, financial planning and industry-specific topics. Search by keyword, niche or publication date. Shape, edit and expand on articles and customize to make them your own. Use them to further explain a topic, showcase your area of expertise or present your own unique perspective. These cost-effective mix-and-match solutions span dozens of niche and industry practice areas, including:

- Business tax
- Individual tax
- Estate planning
- Family business
- Wealth management
- Audit and accounting
- Litigation support
- Forensic accounting
- Personal finance
- International tax
- Manufacturing
- Construction
- Real estate
- Mergers and acquisitions
- Government contracting
- and more!

Our articles come in a variety of formats to best suit your firm's marketing strategy. Mix and match for the most effective content marketing plan.



"The quality and quantity of [the] content is the main reason we use Checkpoint Marketing for Firms. They're very good at making complicated accounting and tax topics understandable to a layperson. Plus, their digital newsletter allows us to choose content from a variety of categories, so I can make the newsletter relevant to a dozen different niches. And when there's a development that our clients should know about, they get out something about it right away. We just couldn't do that as fast and well as they do."

— **Cindy Scott,**
Director of Marketing
Jackson Thornton

Social Media Solutions

The only offering of its kind, Social Media Solutions is a social media marketing resource designed specifically for accounting firms. Whether you're just starting out in social media marketing or are a social media guru, we have the resources you need to take your social media content marketing to the next level. Subscribe to all our solutions or mix and match to build a package that perfectly fits your firm's needs.

Our offerings include:

Emerging Tax and Regulation Alerts —

full length articles in multiple formats covering proposed and newly passed legislation

Social Media Briefs —

fresh content formatted for social media available in several topical areas including individual tax, small business tax, estate planning, business, A&A and more

Social Media Federal Tax Posts —

publishable news updates to keep your followers informed

Social Media Manager —

a digital platform that allows you to publish posts to all your accounts and track success from one place

Social Media Infographics and Fun Facts —

a combination of eye-catching imagery with interesting facts and trivia that encourages prospects and clients to stop scrolling and notice your posts



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For more information, visit tr.com.

Thomson Reuters Checkpoint™

Thomson Reuters Checkpoint tackles market disruption through integrated research, editorial insight, productivity tools, online learning and news updates along with intelligent links to related content and software. It is relied on by hundreds of thousands of tax and accounting professionals and counts among its customers 97 of the Top 100 U.S. law firms, 99 of the Fortune 100 companies and all of the top 100 U.S. CPA firms.

For more information, visit tr.com/checkpoint.

Checkpoint™ Marketing for Firms

Checkpoint Marketing for Firms provides innovative content marketing services and resources that will help your firm thrive — including Social Media Solutions, named as one of Accounting Today's Top New Products of 2017. Our range of customizable, attention-grabbing newsletters, communications and thought leadership content makes it easy to connect with clients, reinforce your brand and ensure the best return on marketing investment.

For more information, visit tax.tr.com/checkpointmarketing.

The intelligence, technology
and human expertise you need
to find trusted answers.



the answer company™

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