BEFORE

How a long-established tax practice introduces itself today

A real Hamilton-area firm's public business description, November 2026. Name withheld.

OPENING LINE, AS WRITTEN

"WE WANT TO BE YOUR MOST TRUSTED TAX ADVISOR AND CONSISTENTLY EXCEED YOUR EXPECTATIONS."

What follows: a short paragraph saying the practice offers practical tax and financial planning to individuals and small businesses.

Buried in the middle: it has been operating for over three decades and serves clients across Canada.

Missing: what services are offered, what it costs, how the process works, and how to get started.

What a new client still wants to know

Do you work with people like me?

Small business owners and families have different needs. Neither is spoken to directly.

Why should I trust you?

Thirty-plus years in practice is the strongest proof, and it isn't in the headline.

What happens if I call?

No first step, no sense of the process, nothing to lower the stress of switching accountants.

Who is this about?

"We want to be" describes the firm's goal. Clients are reading for what they get.

Sample by Mike McCarthy. Not commissioned by or affiliated with the firm.

[Firm name]

TAX · FINANCIAL PLANNING · SINCE [19__]

Your taxes, handled by someone who knows your file.

For more than 30 years, we've helped individuals, families and small business owners file accurately, pay no more than they owe, and plan ahead, for clients across Canada.

Book a call | How it works

For small business owners

Corporate and self-employed returns, HST, and year-round planning so tax time holds no surprises. [Confirm services]

For individuals and families

Personal returns, retirement and estate planning, and help when life changes the numbers. [Confirm services]

Switching accountants is easier than you think [suggested process, confirm]

1. A short call
Tell us what you need. We'll tell you what we'd do and what it costs.

2. Send your documents
Upload securely or drop them off. We give you a checklist so nothing is missed.

3. Review and file
We walk you through your return before anything is filed.

Ready when you are, all year round.
[Phone] · [Email] · [Office address and hours]

Book a call

Sample rewrite by Mike McCarthy from public information. Bracketed items are placeholders for the firm's own details.