Tax Prep 2025

Tip
Build trust with clients by setting tax prep expectations for 2025. Complete the tasks below to ensure your organization's clients are prepared for tax season.

Action Items

- ☐ Create a campaign builder email to notify clients of important tax documents.
- ☐ Create a pipeline view to surface closed borrowers from the past 12 months.
- ☐ Create a flyer for customized marketing to CPAs and financial planners.

Campaign Builder

- Define audience
  - Determine which recent loan participants will find Form 1098 information relvant.
    - First-time homebuyers
    - Purchase clients who funded in 2024
    - Refinance clients who funded in 2024
- Create and attach the educational email.
  - Define Form 1098.
  - Set expectation sfor where Form 1098 will be accessible.
  - Outline the use and benefits of including this form in 2024 tax preparation.
  - Offer support from loan officers for questions on information about their loan.
- Schedule to deploy the campaign in mid-January.

Pipeline Views

- Create a view called "Tax Prep 2024".
  - Prompt your loan officer to place a phone call to these clients as a follow-up to the email. This is an opportunity to answer questions, build trust, and refer tax professional partners.

Related Resources

- *Using the Campaign Builder*
- *Creating and Managing Pipeline Views for Marketing Admins* (simulation)

TOTAL EXPERT