

# The Controller’s Playbook to Predictable \$5k+ Monthly Retainers Tagline

Land high-value clients without chasing low-ticket bookkeeping work.

HOW TO USE THIS GUIDE

This isn’t theory. It’s a step-by-step roadmap you can apply right now to shift from one-off tax prep or bookkeeping clients to predictable, \$5k+ monthly retainers. Skim through once, then revisit each section as you build out your client acquisition system.

Think of this as your checklist for moving upmarket and never going back to low-value grind work.

## 1. Narrow Your Niche (Who Pays \$5k+)

Stop serving “everyone with a spreadsheet.” High-retainer clients are businesses that need strategic financial guidance (contractors, SaaS founders, medspas, multi-location owners). Pick one vertical where your expertise gives you leverage.

## 2. Craft a Revenue-Centric Offer

Stop serving “everyone with a spreadsheet.” High-retainer clients are businesses that need strategic financial guidance (contractors, SaaS founders, medspas, multi-location owners). Pick one vertical where your expertise gives you leverage.

- 1. “We help contractors increase net margins by 15%.”
- 2. “We help SaaS firms extend their runway by 12 months.”

Tie your value to dollars in their pocket, not hours on a clock.

## 3. Authority > Activity

High-value clients don’t Google “accountant near me.” They hire trusted advisors. Build authority with:

- 1. Case studies and 3rd party stories.
- 2. Thought-leadership videos/posts showing how you think.
- 3. Speaking to their specific vertical’s problems (not general tax tips).

## 4. Install an Appointment Engine

Stop relying on referrals. Predictability comes from:

- 1. A clear lead magnet (this exact style of playbook).
- 2. Landing page → call booking funnel.
- 3. Paid ads + outbound messages targeting only your chosen niche.

## 5. Qualify Relentlessly

Every lead isn’t a \$5k+ client. Filter hard. Ask:

- 1. “Are you actively looking for a CFO/advisory partner?”
- 2. “What’s your current monthly accounting spend?”

Don’t waste time on broke businesses. Only chase the ones who see accounting as a growth driver, not a cost.

# Why this matters

If you’re still chasing \$500/month bookkeeping gigs, you’re working harder and harder for less and less. The firms scaling past \$1M+ in revenue are locking in predictable, \$5k–\$10k retainers every month because they’ve built a system to attract, filter, and close the right clients.

This playbook gives you the exact framework to step into that world and finally own your growth, instead of waiting for tax season to bail you out.

Ready to see this system in action?

Book a free strategy session, and we’ll map out exactly how to install your own “Appointment Engine” that fills your



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