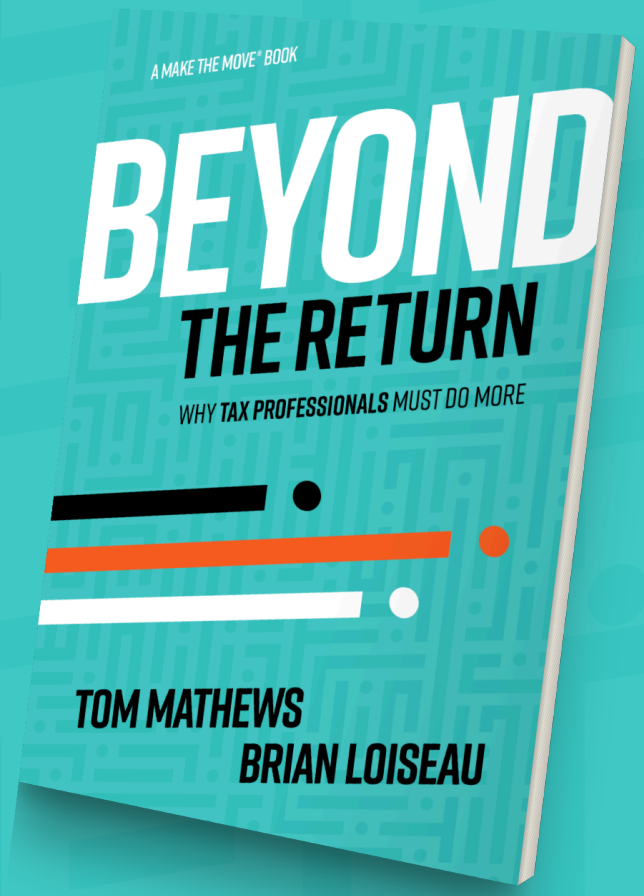
MARKETING KIT · KIT GUIDE

BEYOND THE RETURN

WHY **TAX PROFESSIONALS** MUST DO MORE



EVERYTHING IN THIS KIT, WHAT IT'S FOR, AND HOW TO USE IT.

For WealthWave Financial Educators who want to share *Beyond the Return* with the CPAs, enrolled agents and tax preparers they know.

START HERE

WHAT'S IN THE KIT

Beyond the Return **is Tom Mathews and Brian Loiseau's book for tax professionals. Its argument fits in one line: the tax return was never the finish line. This kit gives you everything you need to put the book in front of the tax professionals you know, and to start the conversation that follows.**

	ASSET	WHAT IT IS	USE IT TO
1	Kit Guide	This document.	Learn the kit in ten minutes.
2	Your Beyond the Return webpage	wealthwave.com/your-name/beyond. A CPA-facing page about the book with a request form.	Send every post, email and text here. Book requests made on your page come to you.
3	Presentation	29 slides, 16:9, about 30 minutes, with full speaker notes. PowerPoint and PDF, and in WealthWaveONE Presentations.	Present the book's case to a CPA, one on one or to a small group, in person or on Zoom.
4	Social media graphics	6 designs, each in square, portrait and story sizes, plus a LinkedIn link image. 19 images.	Post one a week for six weeks. Captions are on page 4.
5	Zoom backgrounds	4 backgrounds, 1920 x 1080.	Make every video call a quiet invitation to ask about the book.

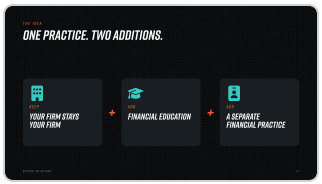
WHO THIS KIT IS FOR

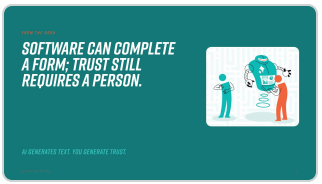
You, a WealthWave Financial Educator, and the tax professionals in your network: CPAs, enrolled agents and tax preparers. The book is written to them. When a tax professional decides to act on it, the CPA Client System (the Client Edition, the cover letter and the playbook) takes over. Ask your leader about that kit.

THE MESSAGE IN ONE PARAGRAPH

Every season, clients finish their return and then ask the real questions: *Are we saving enough? Would my family be all right?* The tax professional is the one person who sees their whole financial picture, and software is taking over the routine work. The book's answer: keep your firm, and add two things: financial education, and a separate, licensed financial practice. Teach first. Serve when asked.









THE PLAYBOOK

HOW TO RUN IT

A simple six-week rhythm. It takes about an hour a week.

1 READ THE BOOK AND FIND YOUR LINK

Read *Beyond the Return* first; you'll be asked about it. Your personal page is wealthwave.com/your-name/beyond (use the same name as your WealthWave webpage). Open it on your phone and request a copy yourself so you see exactly what a CPA sees.

2 PUT UP A ZOOM BACKGROUND

Pick one of the four and use it on every call for the next six weeks. Instructions are on page 6.

3 MAKE A LIST OF TEN

Write down ten tax professionals you know: your own CPA, the enrolled agent a friend uses, the preparer down the street, a client who works in a firm. These are the people you'll message.

4 POST ONCE A WEEK

Post the six graphics in order, one a week, using the captions on page 4. Use the portrait size on Instagram and Facebook, the square on LinkedIn, the story size for Instagram and Facebook Stories. Put your personal link in the caption, your bio or the comments.

5 MESSAGE YOUR LIST

Send the short text or LinkedIn note on page 5 to two or three people a week. Don't pitch. Offer the book.

6 OFFER THE 30-MINUTE PRESENTATION

When someone is curious, offer to walk them through the book's case. Use the presentation with its speaker notes. Practice it once out loud first; the notes tell the story slide by slide.

7 FOLLOW UP

A week after they receive the book, ask one question: *"Which part landed for you?"* Then listen.

SIX-WEEK POSTING CALENDAR

WEEK	GRAPHIC	ALSO THIS WEEK
1	1 · The book	Zoom background on. Request your own copy.
2	2 · The profession is changing	Message three people on your list.
3	3 · 48.4% asked AI	Share the story size the same day.
4	4 · Software can complete a form	Offer one presentation.
5	5 · Starting from ahead	Follow up with everyone who requested the book.
6	6 · The starting line	Ask your leader about the CPA Client System for anyone ready to act.

ASSET 4

SOCIAL GRAPHICS AND CAPTIONS

Files are named btr-social-[number]-[name]-[size].png. Portrait (1080 x 1350) for Instagram and Facebook feeds, square (1080 x 1080) for LinkedIn and anywhere else, story (1080 x 1920) for Stories. The LinkedIn link image (1200 x 627) is for posts where you paste your link. Copy a caption, then add your link.



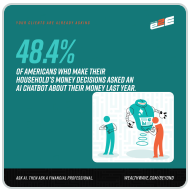
1 · THE BOOK

Every tax season, clients finish their return and then ask the real questions. Will this be enough? Would my family be all right? *Beyond the Return*, by Tom Mathews and Brian Loiseau, CPA, is written for the tax professionals who hear those questions. Request a copy: [your link]



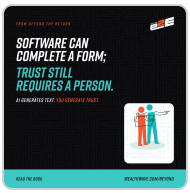
2 · THE PROFESSION IS CHANGING

More than 300,000 practitioners left the profession in four years. $124 trillion is moving between generations. *Beyond the Return* asks what that means for CPAs and the clients who trust them. [your link]



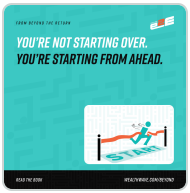
3 · 48.4% ASKED AI

Nearly half of the people who make their household's money decisions asked an AI chatbot about their money last year. Ask AI. Then ask a financial professional. More in *Beyond the Return*: [your link]



4 · TRUST STILL REQUIRES A PERSON

"Software can complete a form; trust still requires a person." One of my favorite lines from *Beyond the Return*, by Tom Mathews and Brian Loiseau. For every tax professional wondering where AI leaves them. [your link]



5 · STARTING FROM AHEAD

"You're not starting over. You're starting from ahead." If you're a CPA, an enrolled agent or a tax preparer, your clients already trust you with their whole financial picture. That's the point of *Beyond the Return*. [your link]



6 · THE STARTING LINE

"The tax return was never the finish line. It was always the starting line." If you know a tax professional who should read this, send them my way. [your link]

Suggested hashtags: #BeyondTheReturn #CPA #TaxProfessionals #FinancialEducation. Figures come from the book: 300,000+ and $124 trillion are cited in Part One; 48.4% is from the Evergreen.ai Financial Decisions Study (Oct. 2026, 1,981 U.S. adults).

WORDS YOU CAN USE

MESSAGES AND SCRIPTS

Make them yours. Short and personal beats polished.

TEXT MESSAGE

Hi [Name], Tom Mathews and a CPA named Brian Loiseau just wrote a book for tax professionals called Beyond the Return. I thought of you right away. Can I send you a copy? [your link]

LINKEDIN NOTE

[Name], I'm sharing a new book with a few tax professionals I respect: Beyond the Return, by Brian Loiseau, CPA, and Tom Mathews. It's about the questions clients ask after the return is done, and what a tax professional can do about them. Would you like a copy? [your link]

EMAIL

Subject: A book I thought you should see

Hi [Name],

You've probably had this happen: the return is done, the client stands up to leave, and then turns around and asks, "Are we saving enough?"

A CPA named Brian Loiseau and WealthWave founder Tom Mathews wrote a book about exactly that moment. It's called Beyond the Return. It looks at what's changing in the profession, from AI to the great wealth transfer, and at the trust you've already built with your clients.

I'd love to send you a copy. You can request one here: [your link]

If it resonates, I'm happy to walk you through the main ideas in 30 minutes.

[Your name]

FOLLOW-UP, A WEEK LATER

Hi [Name], did the book arrive? I'm curious which part landed for you. No agenda, I'd just like to hear your take.

WHEN THEY ASK, "WHAT'S IN IT FOR YOU?"

Fair question. I'm a WealthWave Financial Educator. I teach families how money works, and I think tax professionals are in the best seat in the house to do the same. If you ever want to explore that, I'll show you how it works. If not, I hope you enjoy the book.

ASSETS 3 AND 5

PRESENTING, ZOOM AND WORDING

THE PRESENTATION

- 29 slides, about 30 minutes. Open the PowerPoint in Presenter View to see the notes.
- Three parts, like the book: the pressure, the asset, the system.
- On slide 28, say your own link: wealthwave.com/your-name/beyond.
- Slides are pictures, so fonts look right on any computer. Don't edit the slides; the notes are yours to adjust.
- On Zoom, share the PDF or PowerPoint full screen.

ZOOM BACKGROUNDS

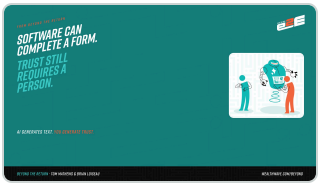
1. Open Zoom and click your profile picture, then Settings.
2. Choose Background & effects (or Backgrounds & Effects).
3. Click +, then Add image, and pick a background JPG.
4. Leave Mirror my video on: you'll see the words backwards, but everyone else sees them correctly.

Sit centered. The words and pictures stay clear of where you sit.









SAY IT THE WAY THE BOOK SAYS IT

SAY

- "Financial education" and "teaching how money works."
- "A separate financial practice," with its own licenses.
- "Their firm stays their firm."
- "Licensed financial services, only where licensed and only when a client asks."
- "WealthWave can show you the next steps to become registered with a broker-dealer."
- "WealthWave Financial Educator."

AVOID

- Saying financial services run through the CPA firm. They never do.
- "Advisory" for the financial side. In the book it means the CPA firm's own work.
- "Financial planning" or "planner."
- Promising tax savings or income figures.
- Naming a broker-dealer.
- Calling the book's stories "case studies." They're composite stories.

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