

Your CPA Startup Roadmap

A Workbook for Women CPAs Starting Their Own Practice



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Welcome to Your CPA Startup Roadmap

Congratulations on taking the first step toward building your own successful CPA practice! This workbook is designed to guide you through the foundational steps to help you clarify your vision, design your business, and launch with confidence. Use this as a hands-on tool to plan, reflect, and take inspired action toward the practice and lifestyle you desire.

Step 1: Clarify Your Vision

Define what success looks like for you. What kind of clients do you want? What does your ideal workday feel like? Write your vision clearly below.

Notes / Action Steps:

Step 2: Define Your Ideal Client

Who do you most want to serve? Describe their demographics, industries, challenges, and how your services will help them succeed.

Notes / Action Steps:

Step 3: Choose Your Services

List the services you want to offer. Focus on your strengths and what your ideal clients need most.

Notes / Action Steps:

Step 4: Set Up Your Business Foundation

Outline your legal, accounting, and operational setup. Include business registration, systems, pricing, and workflow tools.

Notes / Action Steps:

Step 5: Create Your First Offer

Package your services into a clear offer that provides value and solves a client's problem. Define your pricing, deliverables, and messaging.

Notes / Action Steps:

Step 6: Build Your Marketing System

Develop your marketing plan. Include your website, social media presence, and referral strategies to attract clients consistently.

Notes / Action Steps:

Step 7: Launch and Grow

Set a launch date and take action! Track results, refine your approach, and celebrate every milestone toward your growth.

Notes / Action Steps:

Next Steps

You've completed Your CPA Startup Roadmap — a strong start toward your dream practice. To take your progress further, visit **www.cpacoach.org** to access coaching programs, resources, and personalized guidance to help you build a thriving CPA practice with confidence and balance.