

Jason Davis

Age 45

Designation None

Title New business owner

High Score Knowledge seeker

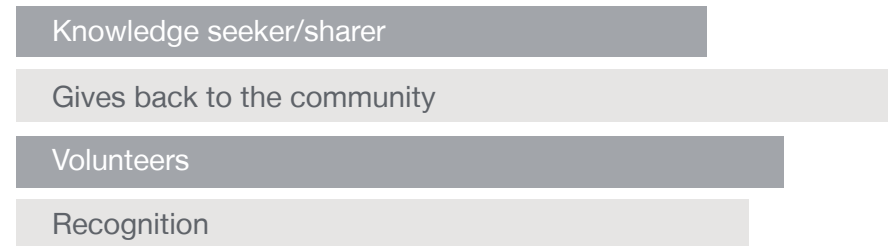
Low Score Research user

Busy

Small budget



Motivations



Behaviors

- Interested in earning a designation
- Prefers online shopping
- Prioritizes price; looks for discounted/free education
- Willing to pay more for high quality education
- Frequently uses social media
- Prefers online communications and text notifications

Bio

Jason, 45-years-old, is new to the industry and is looking to gain knowledge and experience as he gets started building his client list and practice. Jason is open to advice from more seasoned preparers and is interested in earning a designation. Jason prefers to buy things online and prioritizes price by looking for discounted/free online education and office supplies; however, Jason is willing to pay a higher price for education if it is high quality.

Jason was introduced to NATP through a webinar and after completing the free 30-day trial decided to become a member. Jason frequently uses social media sites, specifically Facebook and YouTube, to keep up with the competition, educate the public and recruit new clients. He prefers online communications, and text notifications, as opposed to print, likely has a smartwatch and networks via social media. Jason tends to go online first to find his own answers to any tax questions he may have and wants to remain connected to other tax pros in the industry.

Mary Burgess

Age 70

Designation None

Title Business owner

High Score Education and tax store user

Low Score Research user

Learner

Tech-savvy



Motivations

Knowledge seeker/sharer

Recognition

Volunteers

Advance professional field

Behaviors

- Key decision maker at firm
- Positively promotes NATP
- Member of local NATP chapter
- Purchases firm's supplies directly from NATP
- Concerned more about quality of education and research tools than price

Bio

Mary, 70-years-old, prepares taxes full time at her own practice that also provides tax representation services. Mary has more than the average number of employees at her firm and is a key decision maker with a gross annual business income of more than \$125,000. Cost is not a factor for Mary when considering education and research tools. Mary purchases her firm's supplies annually from the NATP store and enjoys sharing her positive experiences as an NATP chapter member with her professional network.

Mary prefers traditional methods of communication including print publications and in-person education such as NATP's 1040 workshops, Conference and Tax Forums. Topics of interest include small business, payroll, elder issues, retirement planning and farming. Mary strives to be a knowledgeable expert and wants to learn from others and share her knowledge because she believes it will give her a competitive edge. Recognition is important to Mary and she is highly motivated to advance her career.

Don Smart

Age 66

Designation None

Title Business owner

High Score Responds to surveys

Low Score Education, Research and Tax Store user

Expert

Works Independently



Motivations

Staying up-to-date

Behaviors

- Doesn't market business or search for new clients
- Conducts own research
- Provides financial planning services
- Not interested in purchasing items from NATP and isn't interested in paying for research tools
- Uses print resources and guides research tools than price
- Not interested in being published or serving on a committee/volunteering
- Not as concerned with peer reputation

Bio

Don, 66-years-old, is a practicing tax professional who still likes to stay informed of what's going on in the industry. He's not interested in marketing his business, especially through social media, or gaining new clients, but does still prepare returns part-time for pre-existing clients and provides financial planning services. Don isn't interested in purchasing items from the NATP Tax Store and isn't interested in paying for research tools. He will research information he's unfamiliar with using print resource guides and reference materials. Don uses his home's landline as his main contact number and does not make purchases online or with discounts. Don joined NATP from an IRS tradeshow and has been a member of NATP for 20 years and keeps renewing his membership because he wants to stay somewhat connected to the industry and doesn't see the point in cancelling his membership. In comparison to other NATP members, Don is in the second youngest group and has the second shortest membership duration per

Maria Morales

Age 57

Designation AFS

Title Part-time employee of tax firm

High Score Online education/Tax Forum

Low Score Research user

Confident

Thrifty



Motivations

Knowledge seeker/sharer

Saving money

Staying up-to-date

Career credibility

Behaviors

- New to the industry
- Prefers affordable education
- Uses social media recreationally
- Conducts own research
- Regularly accesses information
- Does not volunteer or network

Bio

Maria, 57-years-old, is a part-time employee of a tax firm with an AFSP designation. Maria is new to the industry and prefers affordable education because she believes education provides a competitive edge. She has a strong desire to pursue knowledge and will research herself information she's unfamiliar with. Maria is not involved with her state's chapter and enjoys live webinars and affordably priced in-person education such as NATP's Tax Forum. Maria uses her smartphone recreationally but does not use social networking to help grow her client list. She is a Professional level member who prioritizes free or discounted education. She doesn't take extra steps to protect her clients' data with security software but purchases her client tax return folders when there's a sale. Her focus is knowledge first and takes pride in sharing with her clients' information that may help them with their finances.

Ed Johnson

Age 78

Designation CPA

Title Small business owner

High Score High spender

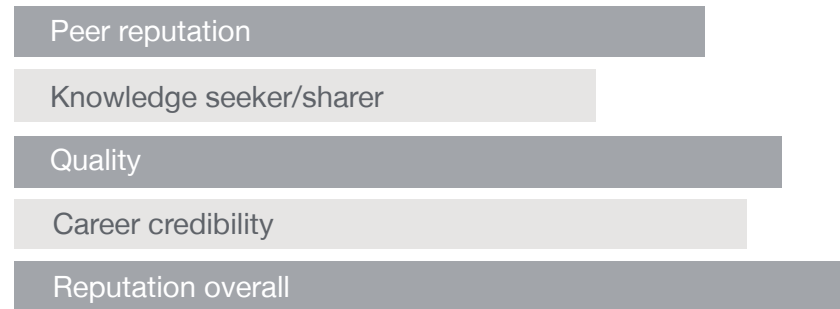
Low Score Volunteer

Professional

High Standards



Motivations



Behaviors

- Attends in-person education, Conference and webinars
- Call research
- Purchases from the Tax Store
- Enjoys personalized content
- Enjoys print media

Bio

Ed, 78-years-old and a retired tax professional, is an established industry expert and is a long-time NATP member. Ed frequently uses NATP's research services and enjoys traditional print media such as textbooks, printed publications and consults handbooks and resource guides. Ed does not consider cost when looking at education to fulfill his requirements to maintain his CPA designation. He is not interested in growing his client list. Ed prefers communications that pertain specifically to his needs and if he receives other communications, will likely unsubscribe from an email or mailing list.

Ed is most likely to attend in-person education events or live online workshops that include topics of individual, payroll, corporation, accounting/bookkeeping, partnership and estate returns. Ed values NATP's research department and frequently consults for advice on his clients' situations before doing his own research. Ed uses his desktop computer to annually purchase his clients' tax return folders, but is not active online otherwise. Ed isn't interested in networking with others and does not enjoy working with a group