



Make the Wait Great

CPA, Tax & Accounting On-Hold Message Ideas

Ready to get started? Use these ideas to answer common questions, help clients prepare, and keep important tax and accounting information current. We provide professional scriptwriting services, or you can enter your scripts into our AI Studio for instant messages and prompts.

TAX SEASON & DEADLINES

- ☐ Filing deadlines, extensions and estimated payment reminders
- ☐ What clients should gather before an appointment
- ☐ When to schedule early to avoid the seasonal rush
- ☐ Office hours and seasonal availability
- ☐ What to bring to tax or accounting meetings
- ☐ How to reschedule or contact the right person

DOCUMENTS, SECURITY & CLIENT TOOLS

- ☐ How to upload documents securely
- ☐ Where to find organizers, returns and account information
- ☐ Reminders not to email sensitive tax documents
- ☐ Fraud, phishing and impersonation warnings
- ☐ How your firm normally communicates
- ☐ How to verify unexpected requests

BUSINESS & ACCOUNTING SERVICES

- ☐ Bookkeeping, payroll and financial statement services
- ☐ Quarterly planning and year-round tax strategy
- ☐ Services for startups, owners and growing businesses
- ☐ Firm specialties and industries served
- ☐ Professional credentials and experience
- ☐ How proactive accounting can support better decisions

TAX UPDATES & FIRM NEWS

- ☐ Filing-rule and threshold changes
- ☐ New credits, deductions or reporting requirements
- ☐ How regulatory changes may affect clients
- ☐ New team members and expanded services
- ☐ Awards, milestones and community involvement
- ☐ Referral reminders and review opportunities

Script Tips

One topic per message. Write individual messages of 50 words or fewer.

Keep it current. Schedule deadlines, seasonal hours and rule-specific topics to start and stop at the appropriate time.

Give callers a next step. Direct clients to your portal, appointment scheduling, document checklist or the right member of your team.

Plan throughout the year. Use tax season, quarterly planning and year-end reminders to keep messages timely.