

## Ensuring Success 2024

### Session 4 Resources – Tax to Financial Planning and Recurring Revenue

Panelists: Nicole Davis, Sean Duncan, Caron Mitchell

#### Webinars:

- Pennsylvania Institute of CPAs: [Turning Your Tax Client into a Financial Planning Client](#)

#### Articles:

- Intuit Tax Pro Center: [How Adding Financial Planning Can Turn a Seasonal Tax Practice Into a Year-Round business](#)
- Journal of Accountancy: [Future-proof Your Tax Practice by Adding Planning Services](#)
- Alliance of Comprehensive Planners: [How to Expand Your Tax Practice to Include Planning](#)
- CPA Practice Advisor: [Avoid These Pitfalls When Adding Financial Planning Services to Your Firm's Offerings](#)

#### Blogs:

- Michael Kitces: [The Top 50 Financial Advisor Blogs and Bloggers](#)
- FeedSpot: [100 Best Financial Advisor Blogs and Websites in 2025](#)

#### Books:

- Nancy Langdon Jones: [So You Want to Be a Financial Planner: Your Guide to a New Career](#)

#### Podcasts:

- Michael Kitces: [22 Top Financial Advisor Podcasts to Listen to in 2025](#)