The Walters Institute

Where Elite Tax Planning Professionals Become Exceptional.

Most programs hand you a roadmap. We walk the journey with you.

The Walters Institute offers a 6-month, high-impact business accelerator for elite tax planning firms who are serious about entering the top 1% of the profession.

Unlike typical coaching programs that offer theory and self-guided study, we deliver mastery through immersive practice -– working side-by-side with you on actual client cases, so you learn by doing it right, right from the start.

Our structured methodology accelerates your success by compressing years of learning into months of real-world implementation.

Timeframe	Day 1 to 90	Day 91 -180 Customizable by firm	Ongoing
Area of Focus	• Learn to create a tax plan for any tax return in 60 minutes or less • Write 50 tax plans and develop the skills you need to handle any client scenario that comes your way • Evaluate your client database to ensure you have identified all clients who are a good fit for tax planning. • Review your tax planning software to so that you're ready to execute a comprehensive plan, every time • Develop your presentations and pitches	• Learn to confidently price your tax plans. • Learn to confidently price your maintenance plans • Train current staff if and/or prepare to train new hires when the time comes • Document implementation steps for every strategy • Develop follow up SOP's • Plan your semi-annual review meeting process • Get to know our Family Office – a well vetted team that has 20+ years of tax planning experience • Learn more about the financial services space to evaluate if you should get licensed, which firms to consider, compensation schedule and more	• Join weekly coaching calls with Heath Walters, CPA and Guy Woodliff, CPA • Participate in bi-weekly Mastermind group with like-minded CPA firms and financial planners

We'll work your first 10 cases hand-in-hand. After 10 cases, if you still need help, we can continue to partner as long as you need the extra support.

As part of our unique mentoring style, our concierge approach also provides you with elite-level access to carefully vetted tax mitigation strategies and the relationships and systems that make them work. We'll share our deep due diligence and introduce you to the vendor and sponsor partners you need to confidently develop new sustainable revenue streams with maximum confidence and efficiency.

Gain elite-level access to carefully vetted tax mitigation strategies that scale into hundreds of custom solutions for any HNW client scenario.

- **01** | Solar Tax Credits
- **02** | Leveraged Charitable Donations (2 different versions).
- **03** | Captive Insurance
- **04** | Defined Benefit Plans
- **05** | Qualified Business Income deductions (QBI)
- **06** | Corporate Structure (S-Corp, C-Corp, SM LLC, Partnership)
- **07** | Restricted Property Trust
- **08** | Deferred Sales Trust
- **09** | Opportunity Zones
- **10** | Private Placement Life Insurance
- **11** | Oil and Gas Investments
- **12** | 1031 Exchanges
- **13** | Charitable Planning

Heath Walters, CPA, CTC

Guy Woodliff, MSA, CPA

In addition to one-on-one mentorship from The Walters Institute team, you'll join a cohort of forward-thinking tax planning professionals who share your ambition and commitment to excellence. When another participant shares an insight or raises an objection you may not have considered, you gain the benefit of their experience without the cost of their learning curve.

Where many firm owners feel isolated, your carefully curated accelerator group becomes an enduring network from which you'll draw motivation, support and strategic insights for years to come.

Our approach is much more than a course. It's a results-driven transformation program for tax planning professionals with an existing high-net-worth client base, a hunger to grow, and the discipline to invest in themselves and their business.

Participants who embrace our proven methodology typically generate

$100-$500K

in new revenue in their first year alone, while building the foundation for sustainable seven-figure growth.

Limited enrollment begins June 1.
Apply now to be part of our next cohort.

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