

## SUCCESS STORY

# Greg O'Brien, CPA

When Greg O'Brien of Boston, Massachusetts started his studies with the Certified Concierge Accountant Mastermind program, he knew his accounting firm was on the path to financial success. Greg and his team of CPAs regularly work with entrepreneurial clients who own startups and small businesses. He knows the discipline it takes to make it big in the business world and Greg was ready for the challenge.

Leaping to double-down on his education, Greg began training with CCA Business Coach Chuck Bauer in one-on-one sessions. Together, they set extremely aggressive 12-month sales and operational goals for his firm... **then he got to work.**

By actively implementing the operational systems and next-level sales tactics outlined by both Chuck and the CCA Mastermind program, Greg transformed his accounting firm in a matter of months.

### Including an Amazing...

**\$221K**

In Annual Recurring Fees

+

**\$81K**

In One-Time Tax Plans

In addition to this amazing financial achievement, Greg was also accoladed by being named a 2020 Top 5 National Finalist for Tax Planner of the Year award by the AICTC, from a pool of 800+ qualified tax planners. **Congratulations, Greg!**

Work Smarter, Make More Money, Take More Quality Time Off!

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