



Phone Call Scripts

Objection: “I don’t want another system to log into.”

Opening Pitch:

Hi [Client Name], it’s [Your Name] from Aprio. I wanted to quickly share a new service we’re rolling out to make IRS and State tax payments completely hands-off for you. It saves time and avoids late fees by automating payments through a platform called Remitian.

Objection:

“I don’t want another account or system to manage. I already have enough logins.”

Response:

I understand completely — this isn’t something you’d have to log into regularly. Think of it more as a back-end tool we use so we can manage payments for you. You’ll just approve the setup once, and after that, we can handle everything or send you one-click approvals when needed. Most of our clients never have to log in after the initial step.

Close:

Would you like me to set up a quick 10-minute session to show you? I think you’ll see how it actually saves you time versus adding one more task.

Objection: “I’d rather keep control and pay directly.”

Opening Pitch:

Hi [Client Name], it’s [Your Name] from Aprio. I wanted to tell you about our new Hands-Free Tax Payment service. It’s a secure way we can schedule and process your IRS and State payments on time, without you having to deal with multiple portals and deadlines.

Objection:

“I don’t like giving up control. I’d rather handle my own payments.”

Response:

Totally get that — and you won’t lose control here. You can still approve every payment before anything is sent, and nothing is processed without your say-so. What this does is remove the hassle of logging into multiple sites, tracking deadlines, and risking late penalties. You stay in control, but we do the heavy lifting.

Close:

Would you like to try it for your next payment? If it doesn’t work for you, we can always go back to the old way.



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Objection: “Is this secure? I’m worried about linking accounts.”

Opening Pitch:

Hi [Client Name], it's [Your Name] from Aprio. We're piloting a new way to simplify tax payments for our clients — it's fully automated, using a secure partner platform called Remitian. It helps avoid late fees and gives you a full audit trail of every transaction.

Objection:

“I'm not comfortable linking my bank account. How secure is this?”

Response:

That's a fair concern, and security is our top priority. The platform uses bank-level encryption, and your login credentials are never stored by Aprio or Remitian. Everything is tokenized, so even we can't see your account details — we only process the approved payment amounts. Many firms and businesses nationwide already use this system safely.

Close:

Would you like me to send you a one-pager on how the security works? Or, we can walk through it together on a quick call so you can see exactly what's protected.

Objection: “I’m used to how I do it now — why change?”

Opening Pitch:

Hi [Client Name], it's [Your Name] from Aprio. We're offering a new service to take IRS and State tax payments completely off your plate — no logins, no deadlines, no risk of penalties.

Objection:

“I've been doing this the same way for years. It works fine. Why switch?”

Response:

I get it — what you're doing now works, but it still takes time and carries risk. With this system, you can automate or one-click approve payments while we track deadlines for you. No late fees, no reminders, no last-minute scrambling. It's one less thing on your plate, and if you ever want to go back, there's no lock-in.

Close:

How about we try it for your next quarter's payment? If you don't see the benefit, we can revert immediately.



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Objection: “What’s this going to cost me?”

Opening Pitch:

Hi [Client Name], it’s [Your Name] from Aprio. I wanted to tell you about a new Hands-Free Tax Payment service we’re rolling out. It saves you time and helps avoid late penalties by letting us manage your payments through a secure system.

Objection:

“I don’t want to pay extra for something I don’t need. What does it cost?”

Response:

The service is included as part of your existing tax engagement with us — there’s no separate subscription fee. In fact, most clients end up saving money because they avoid late penalties and reduce administrative time. It’s more about making the process easier and safer for you.

Close:

Would you like me to walk you through the setup? It’s quick, and we can cancel anytime if you decide it’s not valuable for you.



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Pushback: "Is this secure? I don't like sharing my account info"

Response Template:

Hi [Client Name],

I completely get the concern. Security is our top priority. The platform (Remitian) is **bank-level secure and used by firms nationwide**. Your account is only linked once, and all approvals are done through encrypted channels.

Aprio never sees your login credentials — everything is tokenized, meaning no one can access your bank details except to process authorized payments.

Would you like me to share a one-pager on how security is handled? Or, if you'd prefer, we can schedule a short call to answer any questions.

Best,

[Aprio Accountant Name]