

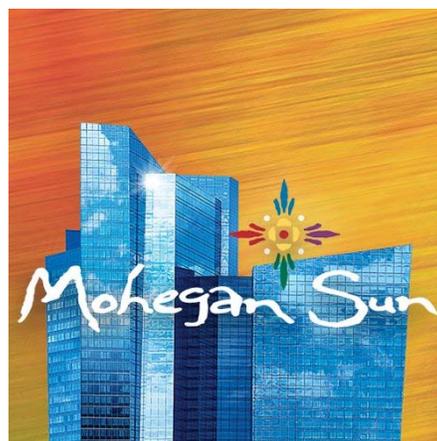


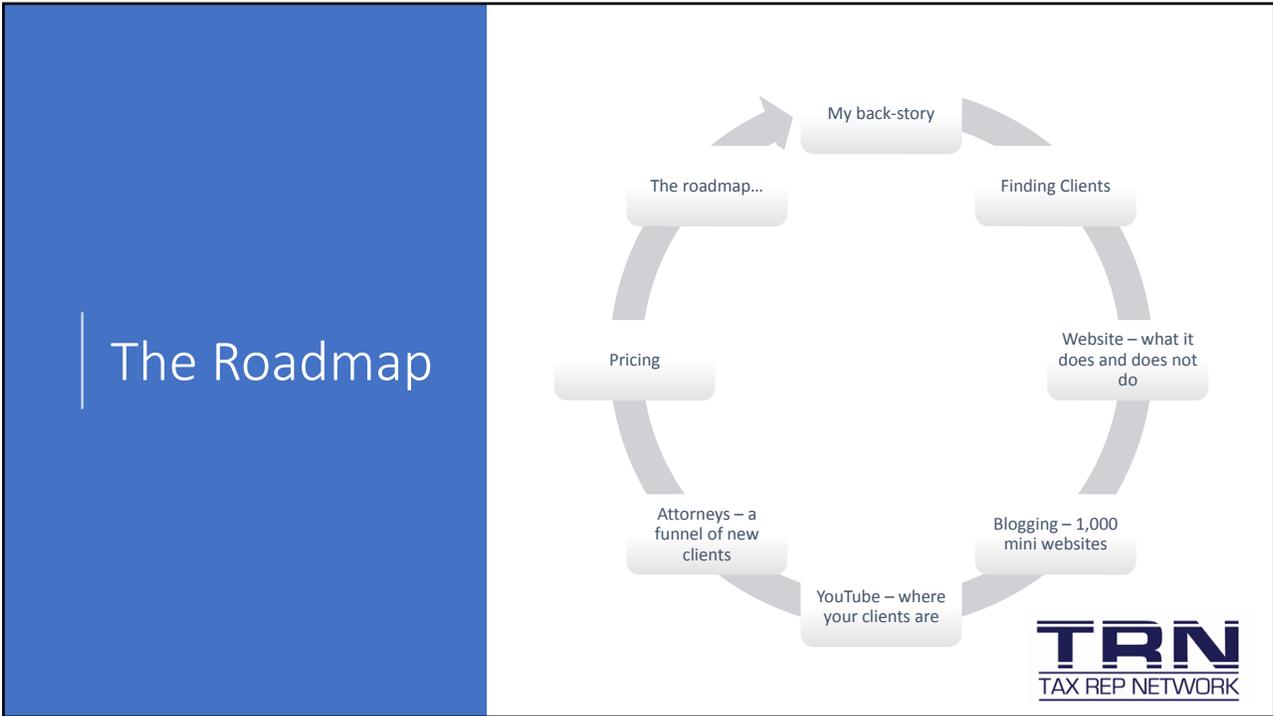
Marketing Guide

Eric L. Green

2018 New England IRS Representation Conference

- Thursday 11/29/18 – LITC Workshop (Quinnipiac Law)
- Friday 11/30/18 – Mohegan Sun
- Members get free access
- Book your hotel early!





My Story

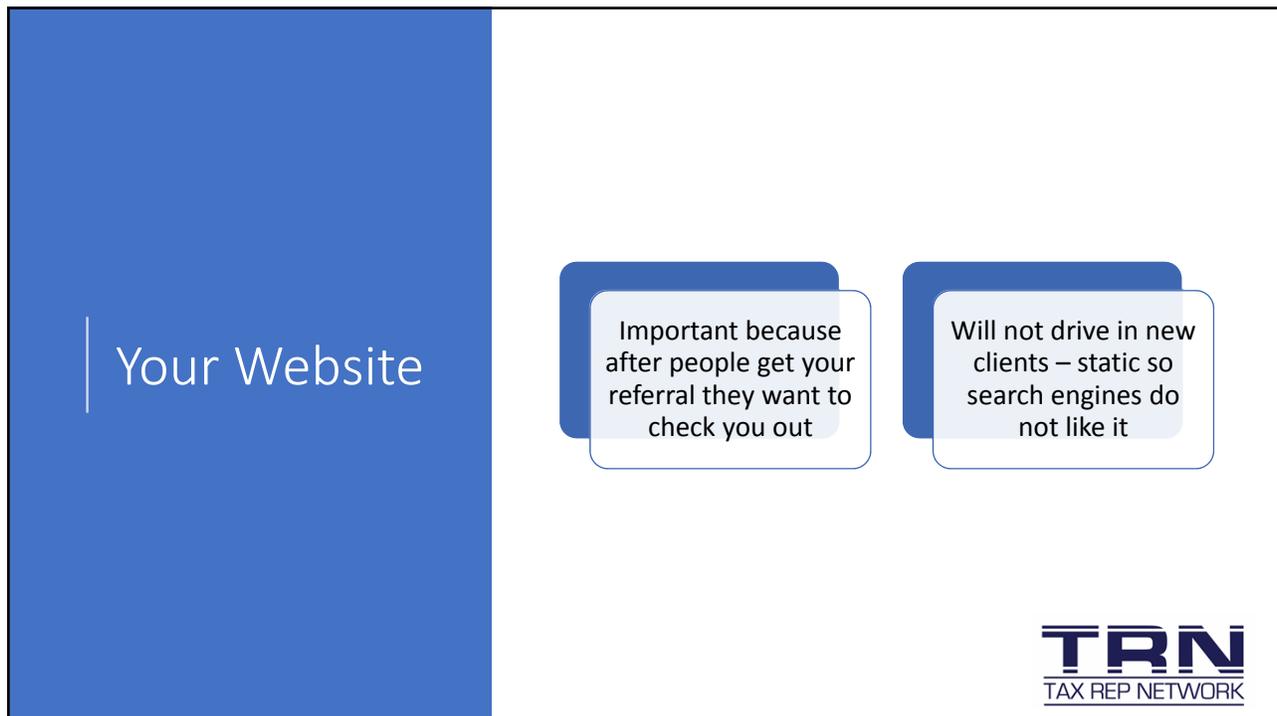
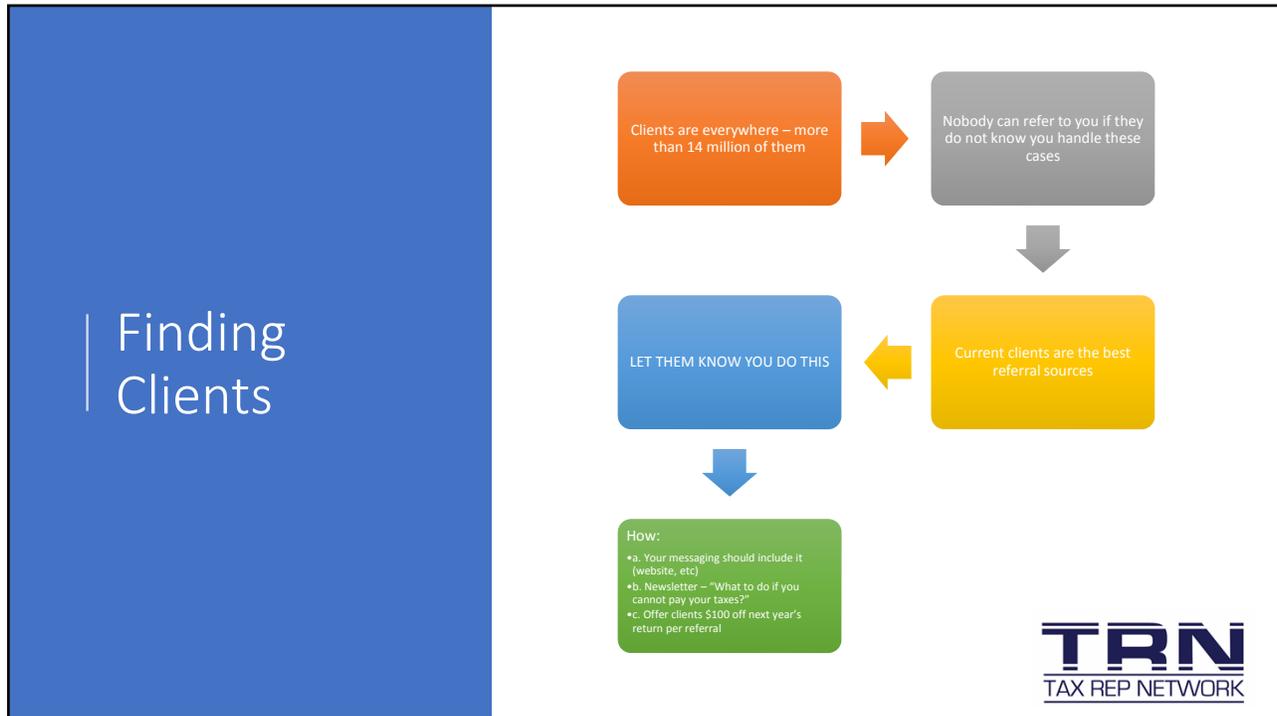
Joined boutique firm

Little support

Needed to find clients, quickly

Real Estate buddy

TRN
TAX REP NETWORK



Hence, Blogging

Blogging does a number
of things:

- Each blog acts as a mini-website
- Back-linking can boost your company website
- New content, so Google like its
- Dive into topics proving you're an expert

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The rules for blogging

- 200 – 500 words
- 2%-4% key word density
- Key words in opening and closing sentences
- Localism!
- Your info
- Hyperlink someplace to every page on your website

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activerain BLOGS Q&A PRODUCTS UNIVERSITY WRITE POST

Home > Blogs > Eric L. Green > CT Tax Attorney

New Haven, CT: Can't Sell the House with a Tax Lien? Nonsense!

BY ERIC L. GREEN
Education & Training with Green & Sklarz LLC
September 04, 2017 03:56 AM

Given that the focus of my practice is civil and criminal tax representation, tax liens are something we deal with frequently. The refrain "I would love to sell my house but there is a tax lien" is one we hear so much it makes me nuts.

The reality is this: you can absolutely sell the house. The IRS will be more than happy to allow the house to be sold. The only thing the IRS requires is that the seller who owes money to the government not walk away with money that the IRS should have received.

So if the taxpayer owes money to the IRS, say \$100,000. They also own a home worth \$400,000. I will explain exactly what the IRS will get in each of the following circumstances:

1. 1. Taxpayer sells and owes the bank \$100,000. In this case the IRS will get full-paid. The house will sell for \$400,000, the bank gets its \$100,000 first (its mortgage is recorded first), closing costs are paid (say

Eric L. Green
Your IRS Tax Litigator
203-285-8545

Have a Tax Issue?

RN NETWORK

Blogging

- Twice per week
- 8 per month
- 104 per year:
 - a. 104 mini websites
 - b. search gives potential clients 104 chances of seeing you
 - c. 104 x 5 back-links per entry is 520 link to your website
 ~ home page, services, attorney profile, contact page, etc



YouTube

- One of the most searched platforms
- Use the blog to create the PPT
- The Powerpoint discussion becomes the video
- Use “Zoom” – available for free
- Create a Youtube Channel for you/your company

TAX REP NETWORK

Attorneys:
Family/Divorce

Back-Tax Returns

Innocent Spouse

Offers-in-Compromise

Tax Liens

QDROs (Qualified Domestic Relations Order)

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Attorneys:
Real Estate
(also realtors)

Tax Liens

Often leads to
Offers, Installment
Agreements, etc

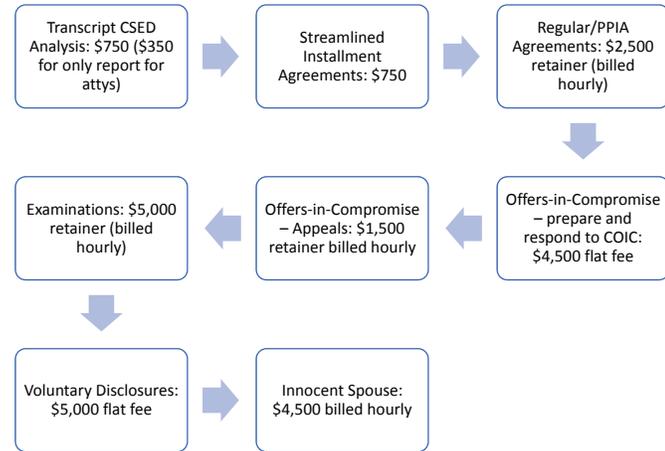
"Selling property
from under a tax
lien"

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Attorneys:
Bankruptcy

- Notice of Federal Tax Liens survive the bankruptcy
- Cannot discharge Payroll Tax/TFRP
- Non-Dischargeable taxes
- Creates opportunities for:
 - a. Offers
 - b. Lien discharge/subordination
 - c. Innocent Spouse
 - d. Make money using THS for CSED calculations!

Pricing: How much to charge?



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Roadmap: What to do with 1 hour a week?

- Pick a day (Sunday am for me)
- Do 1 blog entry (20 minutes)
- Turn blog entry into Powerpoint (4-6 slides, 20 minutes)
- Record video in Zoom of me doing PPT (10 minutes), post in Youtube
- Create 2nd blog entry about video and linking to it (10 minutes)



The Key?

- It must be consistent
- 1 hour a week, every week (or)
- Take on day and knock out a whole bunch, and just post them each week



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So this week
you will do
what?

- Write a blog entry on topic #1: “How IRS Collection Works”
- You will use the PPT I will send you
- You will record your video in Zoom (download it first)
- You will then go and do a second blog entry about collection and talking about the video, with a link to your video

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Letter to your clients...

What to do if you cannot pay the taxes?

We know the story: things are tight financially, so you either (1) do not file the tax return, or (2) file but do not pay the balance due. But do not worry, you tell yourself, next year will be better. Now it is 2-3 years later and a letter arrives from the IRS, and the threats start, and maybe it has even gotten to the point of actual levy and seizure activity. Now the IRS is wreaking havoc on your financial life and you simply do not know what to do.



We know. We have helped many clients through that exact scenario. Well fear not, there is a light at the end

installment agreement: regular, Streamlined, and partial-pay. Which form works best for you will depend upon your personal circumstances and is something we can help you address when you are ready.

Uncollectable Status

Uncollectable status is when the IRS determines that you are unable to make current tax payments. When a taxpayer is deemed uncollectable the IRS may still file a lien to secure its position in the taxpayer's assets but will not otherwise



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Letter to your client...

“I took Attorney Green’s advice and started my IRS representation practice. Without any further advertising other than adding “IRS Representation Practice” to my sign, I added an immediate \$18,000 to my billings on just a few client matters. Marketing to my own clients added more than \$140,000 in income by the end of the first year! The workshop is straightforward and easy to follow, my only regret being that I did not do this sooner!” Anthony Delucia, CPA, Rocky Hill, CT

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Stuff we put in the handouts

- Marketing Roadmap
- Blog Topics
- Blog Post
- Resolution Services Fee Schedule
- Form 433-A Worksheet
- Sample Newsletter
- Sample Retention Agreement



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Resources

- www.taxhelpsoftware.com – transcript/csed calculator (Tax Rep member discount)
- Website – email Klemens (klemensraab@gmail.com)
- Zoom – www.zoom.us
- YouTube – set-up personal channel for your videos
- Blogging – www.activerain.com (\$199/yr or \$39.99 a month), other options include Blogger (free), Patch.com (free but not in every area)

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Questions?



Marketing Roadmap

1. Decide on Pricing
2. Update your retainer agreement
3. Update your website
4. Get a letter/newsletter out to your existing clients
5. Start Blogging (2 entries a week)
 - a. Remember to back-link to your various firm pages
 - b. Remember to focus on localism
 - c. Blog about announcements from IRS and State Dept of Revenue
6. Record those as videos
7. Post to YouTube Channel
8. Letter out to attorneys in your area
 - a. Divorce/Family
 - b. Real Estate
 - c. Bankruptcy
9. Quarterly reminders to past IRS Clients
10. Annual filing Reminders to Past IRS Clients

Date

Name

Address

City, State ZIP

Re: Client Retention Agreement

Dear Mr. _____:

We are pleased you have requested that _____ LLC (“Firm”) provide you with representation as set forth below. We would appreciate receiving written acknowledgement of this agreement for our files. We feel that it is in the best interest of our clients that they be fully informed of our billing practices. The purpose of this letter, therefore, is to set forth the scope of our engagement as legal counsel to you, to set forth the financial arrangements regarding our engagement and to verify our agreement of the foregoing:

1. Scope of Engagement

Subject to the terms and conditions herein, including without limitation advance payment of the retainer and a signed copy of this agreement the Firm will perform those representation services which you requested and, more specifically, to prepare and file an Offer-in-Compromise with the Internal Revenue Service (the “Engagement”).

2. Fee for Representation

The fee for preparing and filing the Offer-in-Compromise with the IRS will be a flat fee of \$4,500.00. This fee must be paid prior to our beginning work on your behalf, and covers our work to prepare the Offer package and respond to any inquires by the IRS Offer-in-Compromise specialist. There will also be a filing fee of \$186 and a deposit that will be due with the Offer that must be paid by you upon filing of the Offer package.

Though we do have a very good track record of filing Offers that are accepted by the IRS, the IRS does often reject the Offer for improper reasons. If this does happen and we, in consultation with you, decide the Offer is worth pursuing to the Office of Appeals we will require an additional retainer of \$1,500 at that time so that can file the Appeal, with our time being billed hourly. My current hourly rate is \$_____ and my staff’s hourly rates vary from \$_____ to \$_____ per hour.

3. Disbursements

The performance of services involves costs and expenses, some of which must be paid to third parties. These expenses include, but are not limited to, filing fees, travel costs, copying costs, telecopier costs, messenger services, long distance telephone charges, computerized research expenses and expenses of experts whom we deem appropriate to assist in our representation of you. We do not charge for internal copying costs, but if a production job is large and must be sent out we will charge you the actual expense. We expect that you will either pay directly or reimburse us for such costs. If such costs may be calculated beforehand and appear to be substantial, we may ask you to advance us those sums before we expend them or to reimburse the vendor directly.

4. Acknowledgment

By executing this agreement, you acknowledge that there is uncertainty concerning the outcome of this matter and that the Firm and the undersigned partner has made no guarantees as to the disposition of any phase of this matter. All representations and expression relative to the outcome of this matter, are only expressions of the said representative's opinions and do not constitute guarantees. We look forward to continuing to work with you and thank you once again for the opportunity to serve.

Very truly yours,

YOUR NAME

READ, AGREED AND CONSENTED TO:

CLIENT NAME

Date

What to do if you cannot pay the taxes?

Representation Newsletter

We know the story: things are tight financially, so you either (1) do not file the tax return, or (2) file the return but don't pay the balance due. But do not worry, you tell yourself, next year will be better. Now it is 2-3 years later and a letter arrives from the IRS, and the threats start, and maybe it has even gotten to the point of actual levy and seizure activity. Now the IRS is wreaking havoc on your financial life and you simply do not know what to do.



We know. We have helped many clients through that exact scenario. Fear not, there is a light at the end of the tunnel.

As it turns out the IRS is usually only too happy to work with taxpayers, but there are some ground rule you need to be aware of and a roadmap to follow.

1. Tax Compliance

The first step in resolving your tax issue is to get into "tax Compliance." Compliance means that you have filed all tax returns due for the last 6 years and have made your current tax payments. Once you are in tax compliance we can now work on resolving the back-tax issue.

2. Collection Alternatives

There are three main collection alternatives to resolve a back-tax debt: Installment Agreement, Uncollectable Status and Offer-in-Compromise.

Installment Agreement

An installment agreement is an agreement to pay the taxes back over time. There are three variations of the installment agreement: Regular, Streamlined, and Partial-

Pay. Which type of agreement works best for you will depend upon your personal circumstances and is something we can help you address when you are ready.

Uncollectable Status

Uncollectable status is when the IRS determines that you are unable to make current tax payments. When a taxpayer is deemed uncollectable the IRS may still file a Notice of Federal Tax Lien to secure its position in the taxpayer's assets but will not otherwise take enforcement action to seize (or levy) the taxpayer's assets or income streams.



Offer-in-Compromise

An Offer-in-Compromise is an agreement where the IRS agrees to accept less than the total amount owed to it and the taxpayer agrees to pay the amount negotiated, as well as maintain his or her tax compliance for 5 years following the acceptance of the Offer-in-Compromise ("Offer").

The basis for an Offer is a formula referred to as "Reasonable Collection Potential" or "RCP." RCP is effectively the net equity in assets plus the taxpayer's excess future income for 12 or 24 months, depending upon how the Offer is structured. There can be significant planning done to help a taxpayer maximize the potential for the Offer's acceptance.

If you or someone you know has an issue with paying their federal taxes and needs help to end their IRS nightmare, please contact us by either phone at _____ or email at _____.

Your Name, Firm Info and Address, Phone and Email

Blog Topics

1. How IRS Collection Works
2. IRS Collection Notices: What do they mean?
3. What to do with the IRS Final Notice
4. Tax Compliance – the key to resolving your tax debt
5. The 10-Year Collection Statute – why it is so important
6. Tax Transcripts – why they matter
7. Options for resolution – uncollectible, installment agreement or offer-in-compromise
8. What is uncollectible status and how to obtain it
9. Why taxpayers end up in the collection division inventory
10. New Collection Standards for 2018 released – Why now is the time to file that Offer-in-Compromise
11. IRS Installment Agreements – which one is right for you?
12. Streamlined agreements – who qualifies and who does not?
13. The offer-in-compromise process
14. The various types of Offers-in-Compromise
15. Offers-in-Compromise: How the RCP Formula actually works
16. Offers-in-Compromise and Tax Compliance: What you need to know
17. Offers-in-Compromise: Lump Sum vs. Deferred, and when to pick one over the other
18. Can you compromise a collected payroll tax
19. Why you should consider filing “married-filing separately”
20. Offers-in-Compromise: how to determine if you are an Offer candidate
21. How Non-Filers can get back into the tax system
22. The RCP Formula: Things you may want to consider purchasing
23. Why you MUST request your Collection Appeal
24. How to make the most of Collection Appeals to resolve your tax debt
25. Uncollectible? Why now may be the time to file your Offer
26. Bankruptcy vs. Offer-in-Compromise: the pros and cons of both
27. When to file an Offer and when should you pursue being deemed uncollectible
28. Using the state tax debt to leverage an Offer with the IRS
29. Cancellation of indebtedness income: how to avoid paying tax on this
30. The COD exceptions
31. What is insolvency for tax purposes?
32. Using bankruptcy to force a payment plan on the IRS
33. Discharging taxes through bankruptcy
34. Challenging a tax debt in bankruptcy
35. Innocent Spouse Relief Part 1 – Innocent Spouse, 6015(b)
36. Innocent Spouse Relief Part 2 – Separation of Liability, 6015(c)
37. Innocent Spouse Relief Part 3 – Equitable Relief, 6015(f)
38. What is Injured Spouse Relief
39. Payroll Tax debts and personal liability

40. How to challenge a responsible person assessment for payroll taxes
41. How to resolve a payroll tax debt
42. Payroll taxes and third party liability: why your family might be in danger
43. But I don't owe this! When to use a "doubt-as-to-Liability" offer
44. But I don't owe this, Part 2! When to request audit reconsideration
45. Doubt-as-to-liability offers v. audit reconsideration: the pros and cons of both
46. How to file an amended return properly
47. Responding to the IRS Examination Document Request
48. The IRS exam process – what you need to know
49. How to select a power-of-attorney to represent you before the IRS
50. Defending the Schedule C "Hobby Loss" exam
51. What to do when the auditor is nuts
52. Utilizing IRS appeals to resolve your tax case
53. What to do if you receive the Notice of Deficiency from your exam
54. What to do with the IRS exam when the client has no records
55. The IRS Exam and the Quickbooks file
56. Everything you need to know about tax penalties
57. How to seek tax penalty relief
58. What is the crime of structuring and why do business owners need to beware of it
59. Why every parent should file a lien against their child!
60. Discharging assets from a tax lien
61. How do tax levies work
62. How to have a tax levy released
63. Confidential informants and whistleblowing: Making Money by helping the IRS!

Home > Blogs > Eric L. Green > CTTaxAttorney

Like: Like 0

New Haven, CT: Can't Sell the House with a Tax Lien? Nonsense!

BY ERIC L. GREEN
Education & Training with Green & Sklarz LLC
September 04, 2017 03:56 AM

Share:

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Eric L. Green
Your IRS Tax Litigator

☎: 203-285-8545

Charging for Tax Resolution Services

- Consultation and Transcript Analysis: \$750
- Streamlined Installment Agreement: \$750 - \$1,500
- Regular Installment Agreement/PPIA: \$2,500 - \$3,500
- Offer-in-Compromise: \$4,500
- Offer appeal; \$1,500 retainer
- Innocent Spouse: \$4,500
- Innocent Spouse appeal: \$2,500
- DATL/Audit Reconsideration: \$1,500 (plus all exam work)
- IRS Exam: Retainer of \$5,000 and billed hourly
- Penalty Abatement: Retainer of \$1,500 and billed hourly

Client Name
RCP Analysis

Income	Actual	Expenses	Actual	Allowable	Allocated	
Wages (yourself)	\$ -	Food, Clothing and Misc	\$ -	\$ -		National Standard
Wages (spouse)	\$ -	Housing & utilities	\$ -	\$ -		Lesser of local standard or actual
Interest - Dividends	\$ -	Vehicle Ownership	\$ -	\$ -		Lesser of national standard or actual payment
Net Business Income	\$ -	Vehicle Operating Costs	\$ -	\$ -		Local standard by region
Net Rental Income	\$ -	Public Transportation	\$ -	\$ -		National Standard
Distributions	\$ -	Health Insurance	\$ -	\$ -		Actual, so long as reasonable coverage
Pension/Soc Sec (taxpayer)	\$ -	Out of Pocket HealthCare	\$ -	\$ -		Higher of actual or the national standard
Pension/Soc Sec (spouse)	\$ -	Court ordered pmts	\$ -	\$ -		Actual so long as payments are being made
Social Security (taxpayer)	\$ -	Child/Dep Care	\$ -	\$ -		Actual so long as payments are being made
Social Security (spouse)	\$ -	Life Insurance	\$ -	\$ -		Actual if its term insurance and coverage is reasonable
Child Support	\$ -	Current Year Taxes	\$ -	\$ -		Actual
Alimony	\$ -	Secured Debts	\$ -	\$ -		Actual so long as payments are being made
Other Income	\$ -	Delinquent State Taxes	\$ -	\$ -		Actual if State is ahead of IRS, otherwise allocated
	\$ -	Student Loans	\$ -	\$ -		Actual so long as payments are being made
	\$ -	Total Living Expenses	\$ -	\$ -	\$ -	
Total	\$ -	Net Difference	\$ -	\$ -	\$ -	

Analysis - Future Income

Income	\$ -
Expense	\$ -
Monthly Available	\$ -