



How to Make Easy Money Helping Non-Filers

Eric L. Green

Agenda

- How to Deal with Non-Filers
- Where to begin
- Pricing these engagements
- Where clients come from
- This elevates your 1040 practice beyond an H&R Block Type of practice
- CFE...?



Who is Eric Green?

- Eric is a partner with Green & Sklarz, LLC in Connecticut and New York
- The focus is civil and criminal taxpayer representation
- Has served as adjunct faculty at the University of Connecticut School of Law
- Past Chair of the Executive Committee of the Tax Section of the Connecticut Bar Association
- Fellow of the American College of Tax Counsel



Who is Eric Green?

- Author of the Accountant's Guide to IRS Collection (www.TGPublish.com/shop)
- Founder of Tax Rep LLC – www.taxrepllc.com
- Columnist for the Journal of Tax Practice & Procedure & Forbes
- Weekly Tax Rep Podcast in iTunes: <https://itunes.apple.com/us/podcast/podcasts-tax-rep-llc/id1276903945?mt=2>



		<p>Who is Eric Green?</p> <hr/>
		
		

<p>What is Tax Rep Network?</p>	<ul style="list-style-type: none">Speaking for clientsCCH IRS Representation Certificate ProgramConsultingOn-Line Tax Pro Community\$100,000 Challenge
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The first Tax Rep member

- Anthony Delucia sat through the original IRS Rep Training Program for 8 hours
- Went home apparently determined to make money that did not include 1040s
- Sent a letter to his clients: “What to do if you cannot pay the taxes?”
- Added IRS Representation to his sign and website
- And....?



Anthony Delucia, CPA, Rocky Hill, CT

- “Eric, I took your advice and started my IRS representation practice after the course. 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! Your workshop is straightforward and easy to follow, my only regret being that I did not do this sooner. Thank you!”
- Anthony sold his 1040 practice after 4 years and now only consults in financial planning and representation matters.



Non-Filers

- There is now estimated to be more than 7 million taxpayers who are non-filers
- These folks needs lots of help
- Great way to make lots of money
- How? Great Question



The Field of Representation

- Get taxpayers a plan of action
- Help them work through the problem
- Follow the Tax Rep roadmap from start to conclusion
- Enjoy way more than \$261 per client
- Save the client's financial life
- Turn the clients into raving fans
- Make more money with way less clients!



The Stats...

Year	Accounts In Collection
2005	6,478,000
2006	7,074,000
2007	8,240,000
2008	9,232,000
2009	9,667,000
2010	10,391,000
2011	10,809,000
2012	11,464,000
2013	11,721,000
2014	12,410,000
2015	13,371,000
2016	14,005,000
2017	14,080,000

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Non-Filers



More than 7
million



IRS announcing
a new initiative
to go after them

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So the phone rings...Follow the Steps!

- Consultation (Charge!)
- Get the bookkeeping done
- Get the back tax returns done
- Get into current compliance
- Resolve the back federal tax debt
- Resolve the back state tax debt



Step #1 – Bookkeeping

- Back tax returns -last 6 years – IRM 1.2.14.1.18
- Bookkeeping for the past years (up to 6)
- Bookkeeping for the current year to date



Step #2 – Tax Compliance


- Get the tax debtor into compliance
- Back tax returns -last 6 years – IRM 1.2.14.1.18
- Current tax payments



Resolve the Tax Debt

- Owe money and just need an agreement?
- Streamlined IA
 - a. Business is 25K over 24 months
 - b. Personal 100K over 84 months or CSED
- Offers-in-Compromise
- Uncollectable Status



 <p>Department of Treasury Internal Revenue Service</p>	<p>2D BARCODE</p> <p>Notice CPS 15</p> <p>Tax Year [REDACTED]</p> <p>Notice date March 2, 2018</p> <p>Social Security number [REDACTED]</p> <p>To contact us Phone 1 [REDACTED]</p> <p>Your Caller ID: [REDACTED]</p> <p>Select code [REDACTED]</p> <p>Page 1 of 4</p> <p>ADR barcode [REDACTED]</p>
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Message about your [REDACTED] Form [REDACTED]
You didn't file a Form [REDACTED] tax return

Our records show that you haven't filed your tax return for the tax year ending [REDACTED]. We sent you a previous notice informing you of this, but the notice may have been returned as undelivered or could not be mailed by the United States Postal Service (USPS).

What you need to do immediately

If you agree that you still need to file your [REDACTED] tax return

- Complete and sign your return, include a payment for any tax due, and mail it to us using the envelope provided.
- If you can't pay the amount due, pay as much as you can now and make payment arrangements that allow you to pay off the rest over time. Visit www.irs.gov and search for keyword: "tax payment options" for more information about:
 - Installment and payment agreements—download required forms or save time and money by applying online using the Online Payment Agreement application if you qualify
 - Automatic payment deductions from your bank account
 - Payroll deductions
 - Credit card payments


Or, call us at 1 [REDACTED] to discuss your options.

- You risk losing your refund if you don't file your return. If you are due a refund for withholding or estimated taxes, you must file your return to claim it by (return due date + 3 years + plus any extension of time to file). The same rule applies to a right to claim tax credits such as the Earned Income Credit.

If you think we've made an error
Complete the Response form to explain whether you've already filed a return, or why you think you don't have to file one. Mail your completed Response form to us using the enclosed envelope.

If we don't hear from you
We may determine your tax for you. Penalty and interest charges may continue to accrue.

If you are owed a refund for the current tax year, or any prior year, it may be delayed because of this unfiled return.

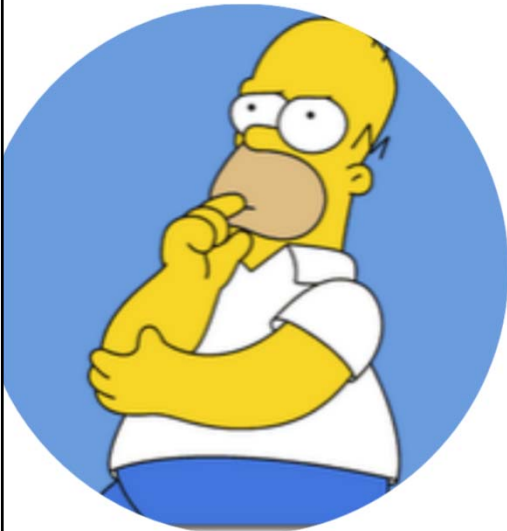


What Needs to be Done?

- 2014 – 2017 Bookkeeping
- File 2014 – 2017 tax returns
- Resolve the unpaid taxes, 50% penalties (Failure to File, Failure to Pay) and interest

Breakdown

- Client should pay for the bookkeeping: $\$200 \text{ a mo} \times 48 \text{ mo} = \$9,600$
- 4 individual 1040 returns with Schedule Cs: $4 \times \$350 = \$1,400$
- Tax Resolution, we need current estimated taxes and P&L: $10 \text{ mo} \times \$200/\text{mo} = \$2,000$
- Offer-in-Compromise: $\$4,500$
- State IA or OIC: $\$2,500$
- Total Fees: $\$20,000$



How many non-filers do you need to add an extra 100K?

- Ummm...5!
- How many 1040s would you need to do...?



The critical thing to create a multi-six figure revenue stream?

- You need to get the word out you do this
- Follow the marketing plan
- Its vey much johnnie appleseed type of marketing
- IT DOES WORK!
- No need to buy expensive programs and lien lists – we never have



What else does tax resolution encompass?

- 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



So Tax Rep Network....?

Invest in the 🔥 HOTTEST 🔥 Growth Area in Tax ... *Without*
All of the Guesswork, Uncertainty, and Support

- ✓ CHECKLISTS! CHECKLISTS! CHECKLISTS! – Value \$997 – FREE!
- ✓ "The Accountant's Guide to IRS Collection" W/ Digital Version – Value \$69 – FREE!
- ✓ "The Accountant's Guide to Resolving Tax Debts" W/ Digital Version – Value \$99 – FREE!
- ✓ Access To ALL Webinars / Handouts / Podcasts – Value \$1997 – FREE!
- ✓ ALL The CPE Credits Training You Will Need For The Year – Value \$3997 – FREE!
- ✓ Access to ALL Private Q&As & Training – Value \$1997 – FREE!
- ✓ ENTIRE "IRS Collection Master Class" – Value \$1997 – FREE!
- ✓ 2-Day IRS Representation Conference (Webcast Access) – Value \$274 – FREE!
- ✓ Consulting and Software Access – DISCOUNTS!
- ✓ *And So Much More...*

Total: \$11,427

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Tax Rep Pro!



- Join the community
- Get the training
- Get the marketing
- Get the checklists
- Get the books
- Save taxpayer's financial lives!
- Create a new revenue stream (and eventually sell your 1040 practice when you wont need it anymore!)
- \$297 a month for access to everything
- Monthly – cancel anytime!

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New this week

Resolving Payroll Tax Issues – The Master-Class!

- Payroll Tax Enforcement – The Landscape
- Payroll Tax Issues: The Basics
- Assessment Against the Company
- Assessment of the Responsible Individuals and Third Parties
- Strategies to Minimize or Avoid Personal Liability
- Resolving the Client’s Payroll Tax Nightmare – Once and For All!



Special Offer TODAY!

- Instead of \$297 pay only \$197 a month for 12 months
- Save \$1,200!
- Create an extra \$100,000 of new revenue (or more)
- Help taxpayers
- Elevate your practice and get paid what you are worth, not what the tax return is worth!
- Go to www.taxrepllc.com
- Use discount code **TAXREPYEAR**
- Valid until **Friday!**



Still not convinced?

- Well then, go check out our IRS Master Class
- Get the Accountant's Guide to IRS Collection E-Book and the IRS Master Class, usually \$299, for just \$49 – good through next Friday
- Get the FREE video and checklist on non-filers
- Click the button below to grab this deal, save \$250, and test drive IRS resolution
- <https://taxrepllc.com/test-drive/>
- Use discount code **MASTER18**



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Questions?



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