Simple Ways to Solve Tax Problems:

How to Make Money Saving Taxpayer's Lives!

Eric L. Green, Esq.

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Agenda

- The Current Statistics
- Simple ways to Resolve Tax Debts
- Turning this into a revenue stream!

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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

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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

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What is Tax Rep Network?

- Speaking for clients
- CCH IRS Representation Certificate Program
- Consulting
- On-Line Tax Pro Community
- $100,000 Challenge

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Sick of banging out 1040s yet…?

- Want to do something more interesting and more lucrative with your EA or CPA?
- This is where you earn your $100k, $200k, $300k as a tax rep master

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Who is this Program For?

- This program is meant for tax practitioners
- Tax practitioners who want to help people
- Practitioners who are tired of grinding out 1040s
- You are in the right place if you:
  - Are a CPA or EA and prepare tax returns
  - Are tired of busy season
  - Are tired of grinding for client's in a way that dont appreciate it
  - Who want to help change people's lives

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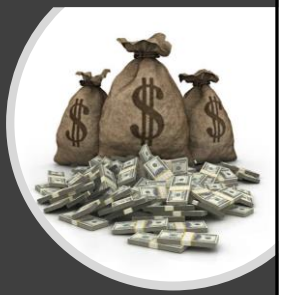
Easy Money Representing Clients…Really?

- Yes!
- Many things you can do that take little effort and bring in significant dollars
- But why represent taxpayers?



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The Coming Legal & Technological Tsunami

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The only thing you can count on to not change is that everything changes…

For 2016 tax year 43% of taxpayers filed their own tax returns

The 2017 Tax Act, with its increased standard deduction, will accelerate this

Reason why H&R Block closed 400 locations?

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Why Representation?

- The average 1040 price, according to National Society of Accountants:
  - 2012: $345
  - 2014: $307
  - 2016: $285
  - 2017: $261
- Why? Client's wont pay you what your time and expertise is really worth!
- The need is huge: If you don't believe me let me show you 14 million reasons why

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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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So how do you save taxpayers?

Simple (easy $$):

- Compliance/Non-Filers (more than 7 million)
- Streamlined Agreements

Quick Planning Ideas:

- File a lien against the child
- File MFS
- File the State Returns First!

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Simple Solutions

- Turn your clients into raving fans
- Save client's financial lives
- Make WAY MORE than $261 for a 1040!

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Simple #1: Compliance/Non-Filers

- Get the tax debtor into compliance
- Bookkeeping updated
- Back tax returns -last 6 years – IRM 1.2.14.1.18
- Current tax payments
- Fees – whatever you charge for these services plus the consult fee (I am $475/consult)

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The hysterical phone call!

- Have not filed in four years (14-17)
- Revenue Officer left her card in my front door
- Don't want to go to jail!

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Road Map

1. Tax Compliance
   a. Back Tax returns filed
   b. Current estimated tax payments made
2. Tax Resolution
   a. Current P&L
   b. 433-A Analysis (RCP)
   c. Resolution

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Cost?

- Client should pay for the bookkeeping: $200 a mo x 48 mo = $9,600
- 4 individual 1040 returns with Schedule Cs: 4 x $350 = $1,400
- Tax Resolution, we need current estimated taxes and P&L: 3 mo x $200/mo = $600
- Offer-in-Compromise: $4,500
- State IA or OIC: $2,500
- Total Fees: $18,600

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So…how many clients do you need?

- So how many Non-Filers do you need to find of the 7 million to make an extra $100,000?
- Ummm….6
- How many 1040s would that be?

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Simple Idea #2

- Owe money and just need an agreement?
- Streamlined IA
- a. Business is 25K over 24 months
- b. Personal 50K over 72 months or CSED
- But…what about the pilot program….

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New Streamlined IA

- For individuals only
- Streamlined IA now 100K over 84 months
- Strategies around this…
- Our Fee? $750 - $1,500, depending upon meetings

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File a Lien Against the Child…

- Podcast – Why Every Parent Should File a Lien Against Their Child
- Lien protects the family's investment
- Line protects the child/spouse/significant other
- Promissory Note, Security Agreement, UCC Filing
- Client Case: Concrete Trucks

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Mistake #1: Married Filing Joint

- Knee jerk from most practitioners is married-filing-joint
- May create some serious headaches
  1. Is there exposure from a business to the other spouse?
  2. Is there a balance that wont be paid?

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Married Filing Separate

- If the return is not filed….STOP!!!
- Do the RCP calculation – what does the collection resolution look like?
- Is Married Filing Separate Better?

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File the State Returns First

- Don't efile the return
- Client takes the return, signs it, files state first (Certified)
- Once confirmation of State return acceptance and letter from state, file Federal Return
- Get State out in front as leverage against the IRS!

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Fees?

- 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

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Invest in the hottest growth area in tax, knowing you have support, and without all of the guesswork and uncertainty

CHECKLISTS, CHECKLISTS, CHECKLISTS – Value $997 - ***INCLUDED!***

The Accountants Guides Digital Version – Value $160 - ***INCLUDED!***

Access to all Webinars/Handouts/Podcasts – Value $1,997 - ***INCLUDED!***

All the CPE Credits and Training You Will Need for the Year – Value $3,997 - ***INCLUDED!***

Access to All Private Q&As, the Member Forum, and Training - $1,997 - ***INCLUDED!***

Access to the Master Classes on Collection, Payroll, etc – Value $1,997 - ***INCLUDED!***

16 hours of Deep Dive Programs in Everything Collection and Marketing – Value $1,000 - ***INCLUDED!***

Access to the 2-Day IRS Representation Conference – Value $275 - ***INCLUDED!***

Consulting with Green & Sklarz for 1 hour per month – Value $5,700 - ***INCLUDED!***

And So Much More…

~~Total: $18,120~~

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Become a 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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Special Offer TODAY!

- Instead of $297, the **FIRST 10 PEOPLE TO JOIN** pay only $197 a month for 4 months
- Save $600!
- 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 **TAXREPPRO**
- Valid until **Friday!**
- **Cancel Anytime!**

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When you join…

- When you join, first do the "Start Here" video
- Go through the 16 hours of Deep Dive training
- Review the marketing strategies and download the materials
- Start adding the $100,000 to this year's bottom line!

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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**

YES, I WANT TO TEST DRIVE IRS RESOLUTION!

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Questions?

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