

6 Steps to Maximize Your Tax Rep Practice Growth by Automating Your Client Experience

Eric L. Green, Esq.

TRN
TAX REP NETWORK

Eric Green, Esq.

- ▶ Managing partner in Green & Sklarz LLC, a boutique tax firm with offices in Connecticut and New York.
- ▶ Focus is civil and criminal taxpayer representation before the Department of Justice Tax Division, Internal Revenue Service and state Departments of Revenue Services.
- ▶ Is a contributing columnist for Bloomberg Tax
- ▶ Attorney Green is the past Chair of the Executive Committee of the Connecticut Bar Association's Tax Section.
- ▶ Eric is a Fellow of the American College of Tax Counsel ("ACTC").

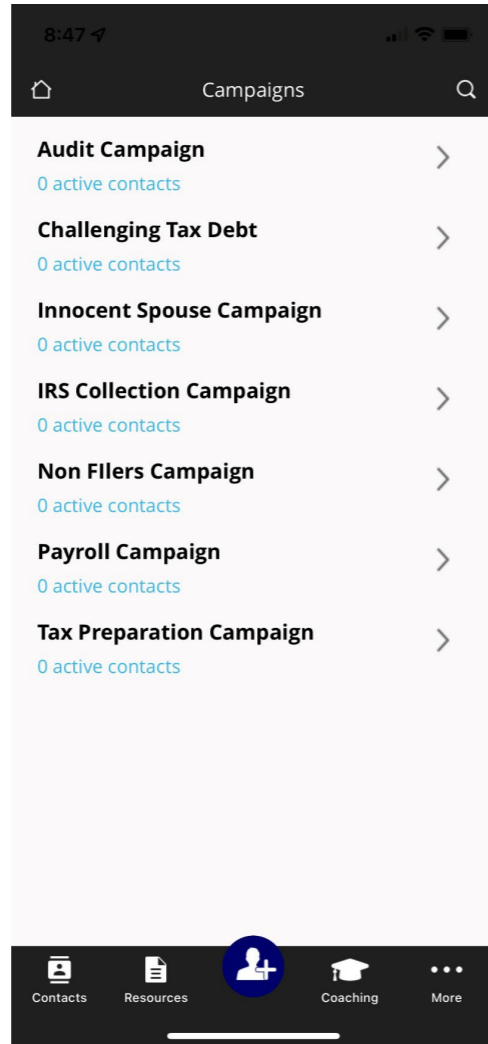
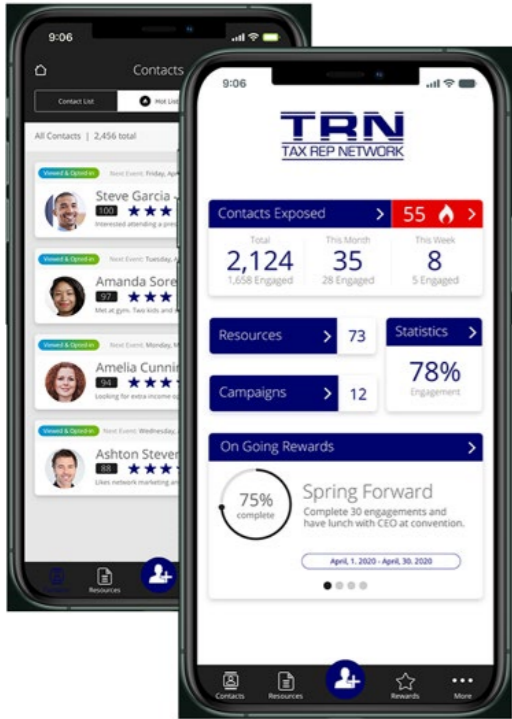


Eric Green, Esq.



- ▶ Eric is the host of the weekly Tax Rep Network Podcast, available in iTunes, Apple Podcasts and Google Podcasts
- ▶ Eric is the founder of Tax Rep Network, an online community designed to help tax professionals build their IRS Representation Practice
- ▶ He is the author of the Insider's Guides
- ▶ Created the Tax Rep App
- ▶ Created the Certified Tax Representation Consultant program for CCH, University of Connecticut Business School and Tax Rep Network

Download the App!



- ▶ Updated IRS tables
- ▶ Special Offers from our Sponsors
- ▶ Training videos

Premium Version:

- ▶ Updated marketing campaigns!

Download Rapid Funnel App, use group code "TRN"

11th Annual New England IRS Rep

- ▶ 11/7 and 11/8
- ▶ Both days are at Mohegan Sun
- ▶ Can't make it – join the live webcast
- ▶ \$229 until 10/1, then \$399 until 11/1, then \$499
- ▶ <https://irsrepconference.com>



4th Annual Tax Rep Summit

- ▶ Orlando, 12/10 – 12/13
- ▶ Early Bird \$795 until 9/15
- ▶ Sept 16th - \$895
- ▶ November 1 - \$995
- ▶ **Members: \$249!**
- ▶ <https://taxrepllc.com/2024-summit/>

Sponsored by



Six Steps



1. Automate Your Engagement Letters
2. Automate Your Payments
3. Automate the Tax Organizer
4. Automate The Return Preparation
5. Automate Your Transcript Monitoring
6. Automate Your Reviews

Your Job

- ▶ Is to bring in clients
- ▶ Its not to be a jack-of-all-trades
- ▶ You cannot make money that way



The process: Rep Clients

- ▶ Attract new clients
- ▶ Onboard the clients and get paid
- ▶ Charge appropriately
- ▶ Resolve the case
- ▶ Close/Monitor

Attract Clients: Reviews

- ▶ Social proof is the most bullet proof way to get new clients
- ▶ Think about how you buy anything – don't you look at the reviews?

Tax Rep LLC

One Audubon Street 3rd Floor, New Haven, CT

5.0 ★★★★★ 430 reviews ⓘ

People often mention

All

resource 48

learned 27

practice 24

CPA 22

+6

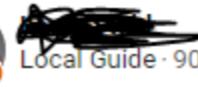
Sort by

Most relevant

Newest

Highest

Lowest



Local Guide · 90 reviews · 55 photos

★★★★★ 5 days ago **NEW**

Every course I attend is thorough and helps my business provide the best knowledge and services to my clients. I appreciate all the hard work that goes into your program! Retain your excellence! ... [More](#)

Like

Write a review

Reviews do many things



1. Increases SEO
2. It helps potential clients make the decision to hire you
3. It allows you to respond to a negative review and make it a positive

Next Steps

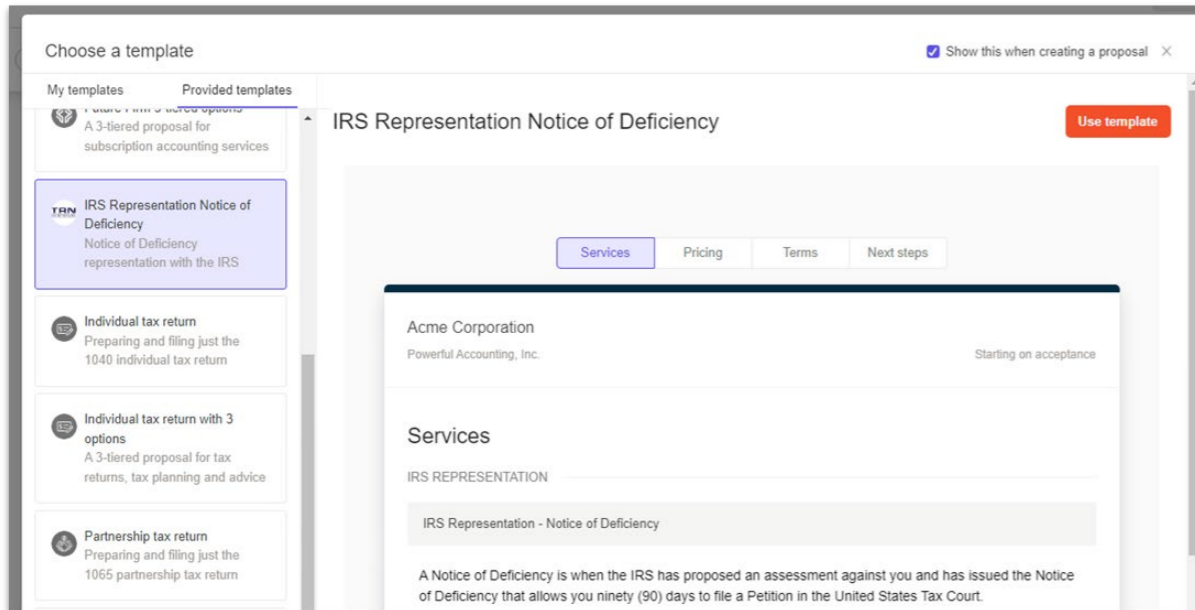
- ▶ Set-up NiceJob, load in your clients, get the reviews
- ▶ Anything negative – make sure you respond like a professional – opportunity to sell new clients
- ▶ Use the code TRN50 and get 50% off the first three months (so \$37.50 instead of \$75)
- ▶ Best \$100 you will spend this year!

Engagement Letters & Payment

- ▶ Eric's 25-30 no-signs reduced to 5
- ▶ Automate the follow-up
- ▶ Automate Payment (no filing until \$\$\$)
- ▶ Average case of \$8,350 x 20 more cases signed up = \$167,000

ignition 

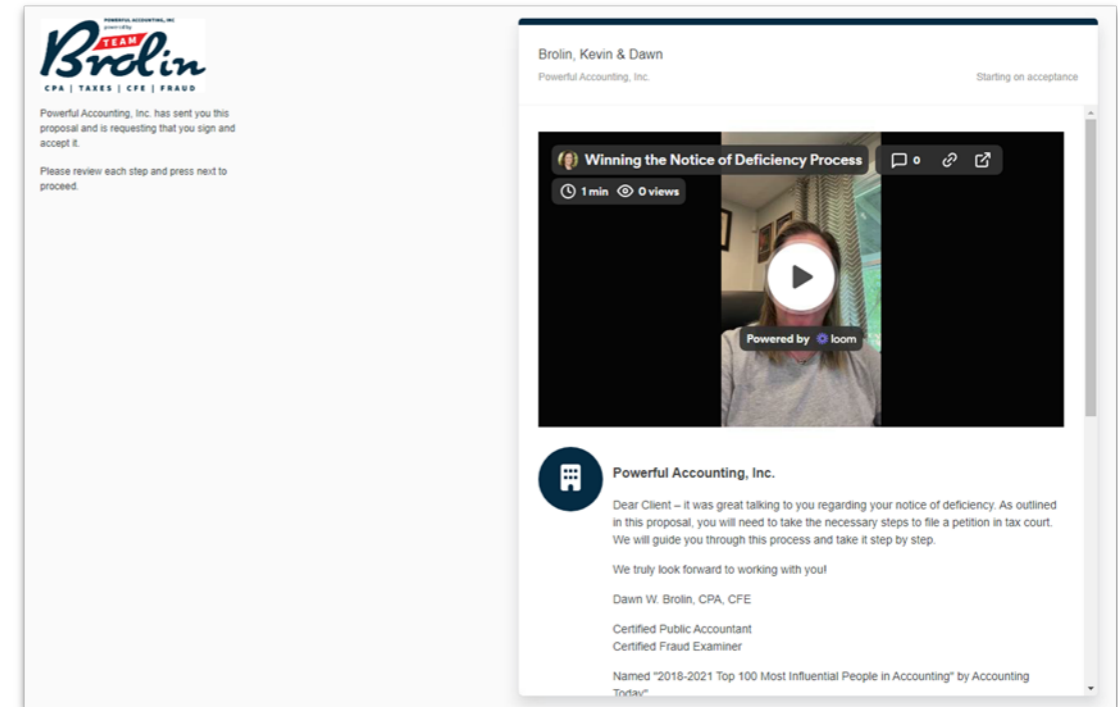
Ignition



- ▶ Templates are loaded
- ▶ Letters are loaded
- ▶ Load in your clients, increase your price for 2025, and nobody gets shit done until its paid
- ▶ You want 95% of your money in before you do anything

The Video

- ▶ Saves me from the “2nd consult”
- ▶ Clients love this



Automate (sort of) the Resolution

- ▶ Software enables you apply the standards
- ▶ Drop in information from the transcripts
- ▶ Run scenarios
- ▶ Enable transcript monitoring
- ▶ Identify FTA opportunities (contingent fee....)

**Tax Help
Software**™

Next Step

- ▶ Set up Tax Help Software
- ▶ Get 8821s on all your clients (“to confirm returns filed appropriately and all wage and income information is captured”)
- ▶ Look for FTA opportunities – should be an automatic
- ▶ Suggest annual monitoring of their account (\$495/yr to \$99/month)

Special Deals

- ▶ NiceJob - <https://nicejob.partnerlinks.io/tax-rep-network>
~ Use Code TRN50
- ▶ Ignition – <https://ignitionapp.info/TaxRep>
~ Use taxrep-1 for 50% off 3 months on Pro/Pro Plus Plans
- ▶ Tax Help Software – <https://taxhelpsoftware.com/TRN>
~ 6 months for \$250

Questions?

