

State of Tax Rep Network 2024 Update

Eric L. Green, Esq.




Agenda

- ▶ IRS Update
- ▶ Webinars Going Forward
- ▶ New Membership Levels
- ▶ Websites
- ▶ NE Rep Conference
- ▶ Tax Rep Summit
- ▶ Certification
- ▶ New Training and Tech Partners
- ▶ \$100,000 Challenge
- ▶ TRN Social
- ▶ Tax Rep App
- ▶ New Checklists, Letters and Forms
- ▶ Platinum Master Mind

Tidal Wave Has Begun - Finally

- ▶ We've been talking about the automated enforcement starting "this summer"
- ▶ It started!
- ▶ Letter 11s are going out

IRS Update: Letter 11s



Department of the Treasury
Internal Revenue Service
ACS Support
PO Box 8208
Philadelphia, PA 19101-8208

024532.465617.228241.5864 1 MB 0.622 858

024532.465617.228241.5864 1 MB 0.622 858

C/O ERIC L GREEN
1 AUDUBON ST FL 3
NEW HAVEN CT 06511-6431030

For your reference

Notice name **LT11**
 Notice date **08/12/2024**
 Case Reference number [REDACTED]
 Taxpayer ID number [REDACTED]

New quick, easy, and secure online payments
 Visit [IRS.gov/lt11](https://irs.gov/lt11) to avoid interest and applicable penalties or time lost on the phone.

Page 1 of 5

⚠ Notice of Intent to Levy and Your Collection Due Process Right to a Hearing

To: [REDACTED]

As of August 12, 2024, we haven't received your overdue tax after sending several notices to you. You must pay your balance before September 12, 2024 or we will levy (seize) your property. If you do not make your payment now, we'll consider your noncompliance an active choice and you could face a levy.

Amount Due Immediately: \$138,688.69

Payment must be received before September 12, 2024 to avoid a levy on your property. For options, see page 2.

What You Need To Do Immediately

<p>Gather this information</p> <ul style="list-style-type: none"> ☐ Your taxpayer ID number (see the reference box above) ☐ Form numbers (1040) for the outstanding tax years ☐ Your filing status for the outstanding tax years ☐ Address from the outstanding tax years 	<p>Pay directly online from your bank account</p> <ol style="list-style-type: none"> 1. Go to irs.gov/directpay 2. Select "Make a Payment" 3. Follow the instructions to make your payment for each outstanding tax year
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Notice: LT11

Notice date: 08/12/2024

TIN: [REDACTED]

Page 2 of 5

Consequences If You Do Not Pay Immediately

We will **seize (levy) your property or your rights to property** if you fail to comply. Property includes wages and other income, bank accounts, business assets, personal assets (including your car and home), Social Security benefits, Alaska Permanent Fund dividends, or state tax refunds.

We can **file a Notice of Federal Tax Lien**, notifying your creditors that we have a claim (lien) against all your property. If we file the lien, it may be difficult to sell or borrow against your property.

The U.S. Department of State may **revoke your passport or decline to issue or renew a passport** if you have seriously delinquent tax debt totaling more than \$62,000. For more information, visit irs.gov/passports.

Other Options

If you do not wish to pay directly online from your bank account, you may...

<p>Pay online by card (additional fees may apply)</p> <ol style="list-style-type: none"> 1. Go to irs.gov/payments 2. Select "Pay Your Taxes by Debit or Credit" 3. Select an IRS-cleared payment processor 4. Pay through the payment processor's website 	<p>Pay by check or money order</p> <ol style="list-style-type: none"> 1. Make your check or money order payable to the "United States Treasury" 2. Write your taxpayer ID number (XXX-XX-1344) on your payment 3. Mail your check or money order with the payment stub on the last page, make sure to allow time for mailing and processing 	<p>Pay your balance over time (additional interest & fees may apply)</p> <ol style="list-style-type: none"> 1. If you can't pay the total amount due, pay as much as you can now and visit irs.gov/opa to set up a payment plan for the remaining balance. 2. For alternative options for those with financial hardships, including offer in compromise and temporary delay of collection, visit irs.gov/payments.
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- Visit irs.gov/lt11 for more information about this notice.
- If you can't find what you need online or need assistance, you can call the IRS at 833-282-7220. Find tax forms or publications by visiting irs.gov/forms.
- We're required to send a copy of this notice to both you and your spouse. Each copy contains the same information about your joint account. **Please note:** Only pay the amount due once.

How to Request an Appeals Hearing

If you want to appeal this levy action, complete the enclosed Form 12153, Request for a Collection Due Process or Equivalent Hearing, and send it to us by September 11, 2024. **You must complete, sign, and return this form to the above address by September 11, 2024 to preserve your right to contest an Appeals decision in the U.S. Tax Court.** A request received by the Service will generally be considered timely if the request is deposited with the United States mail within the 30-day period referred to, has a postmark date within the 30-day period, and the envelope containing the request is properly addressed with the correct postage prepaid. **If you send the letter after September 11, 2024, you may still be entitled to a hearing; however, you'll forfeit your right to contest an Appeals decision in Tax Court.** Refer to the enclosed Publication 1660, Collection Appeals Rights, for more information and information on Collection Appeals Program (CAP).

Impact

- ▶ Extreme Growth of Tax Rep (40%)
- ▶ Content Licensing: Rightworks, Intuit, NATP, Becker
- ▶ We are all going to get very busy, very quickly....



Webinars Going Forward



Training webinars
are going to be for
members only

Webinars with our
partners will
continue

Membership levels

- ▶ Silver - \$99/month or \$999/year
- ▶ Gold - \$399/month or \$3,999/year
- ▶ Gold Plus - \$995/month or \$9,950/year
- ▶ Platinum Master Mind - \$18,000/year

Special Offer

- ▶ We did this – saw massive sign-ups
- ▶ Ending this next week on 9/20
- ▶ 6 months of membership (\$2,400 value), complete set of books (\$600 value) and the Summit (\$795 value) for just \$1,499
- ▶ <https://taxrepllc.com/launchgold-inperson>

Websites

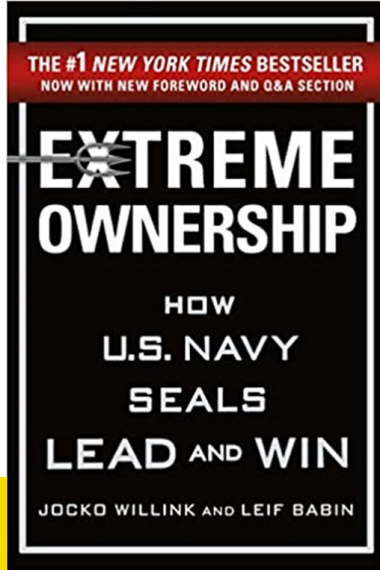
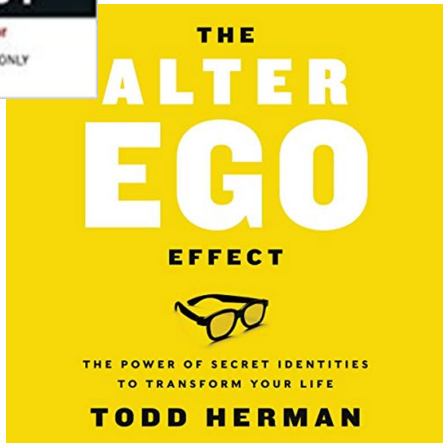
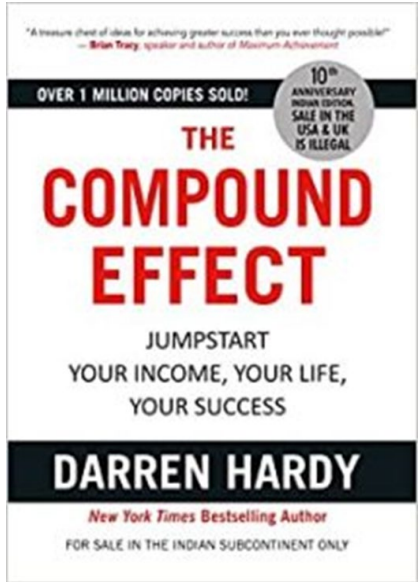
- ▶ <https://www.taxrepdigital.com/>
- ▶ Need help?
- ▶ Gaynor@charismaink.com

Choose From These Website Templates

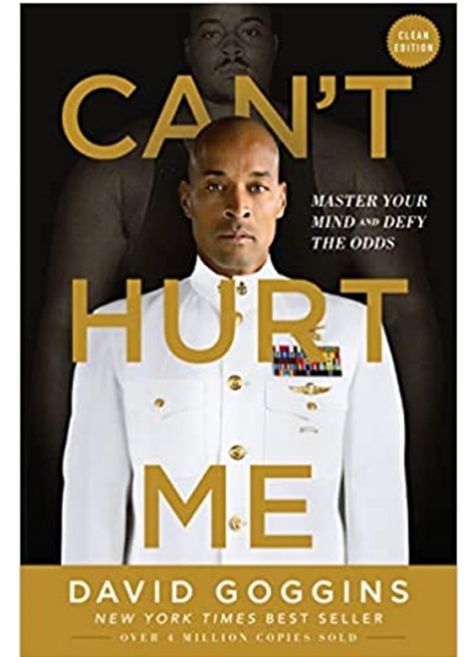
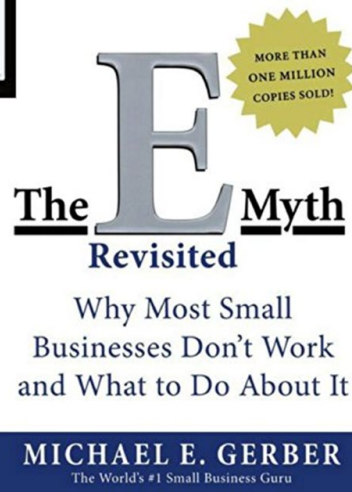
The image displays six website templates arranged in a 2x3 grid. Each template is shown on a laptop and two mobile devices (tablet and smartphone). Below each set of devices is a red button with the text 'Order Now'.

- Accountable:** Features a laptop with 'WE ARE TAX REP USA' and a person working at a desk.
- Balanced:** Features a laptop with 'WE ARE TAX REP' and a woman in a professional setting.
- Calculated:** Features a laptop with 'WE SOLVE TAX PROBLEMS' and a man in a suit.
- Documented:** Features a laptop with 'WE SOLVE TAX PROBLEMS' and a woman.
- Exempt:** Features a laptop with 'WE SOLVE TAX PROBLEMS' and a dark background.
- Fiscal:** Features a laptop with 'WE SOLVE TAX PROBLEMS' and a dark background.

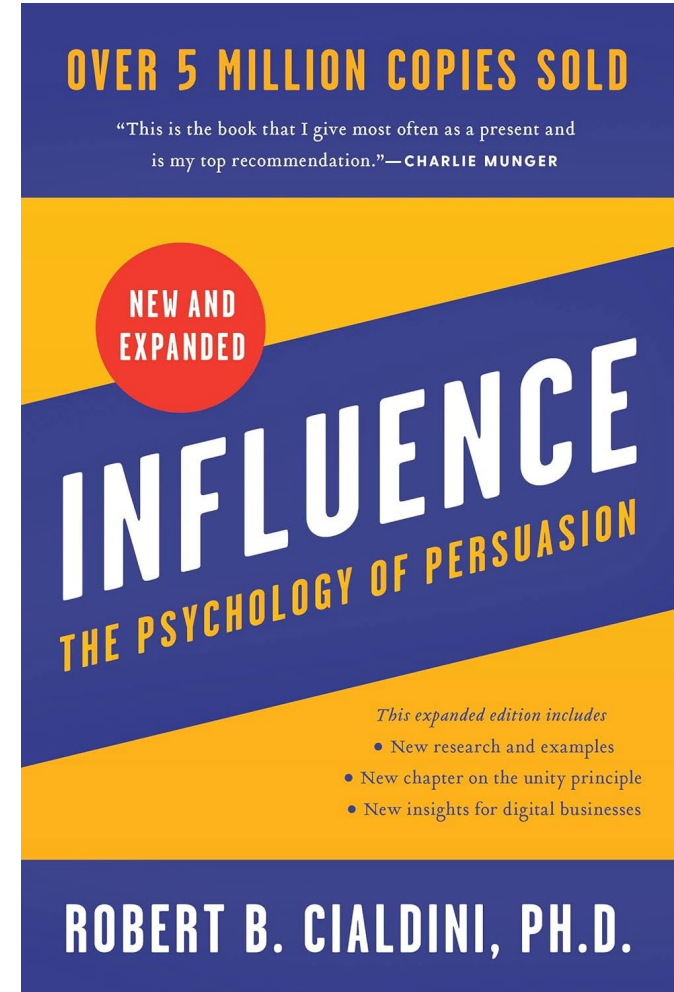
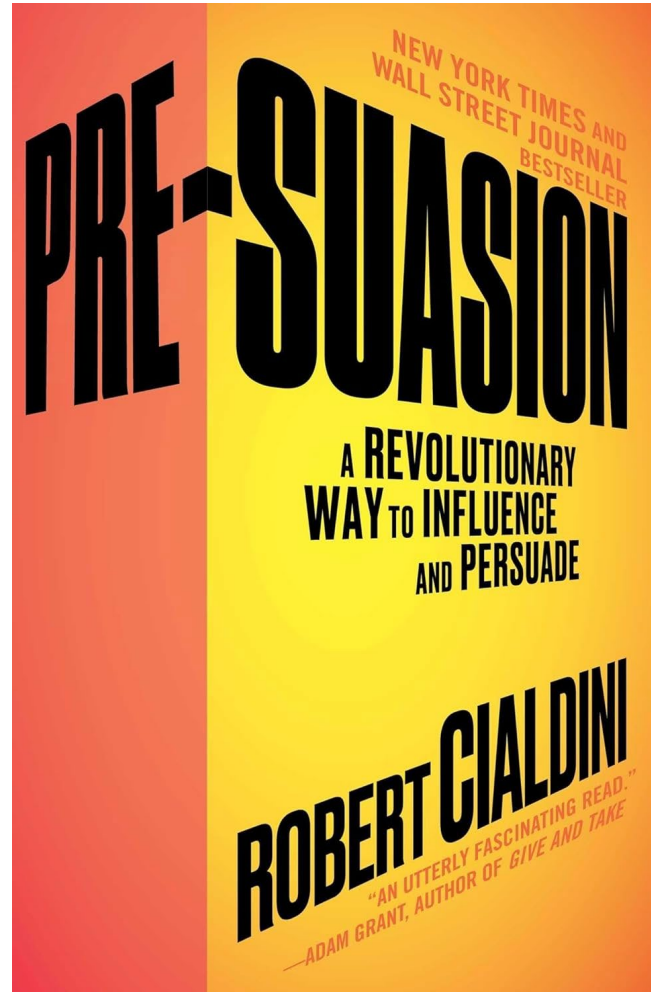
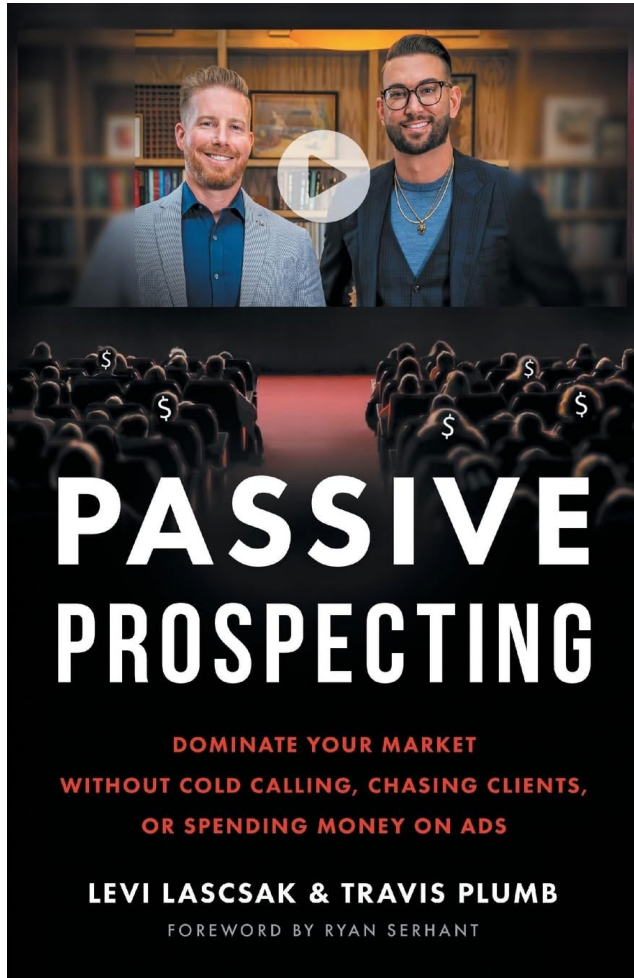
Eric's Reading List



What Every Successful Entrepreneur Knows



Eric's Reading List



11th Annual NE IRS Rep Conference

- ▶ Both days at Mohegan Sun
- ▶ 11/7 and 11/8
- ▶ Free for Members
- ▶ In Person?
- ▶ Breakfast on 11/9
- ▶ Email Team@taxrepllc.com



Orlando will be even better!!!!

- ▶ 12/10/23 – 12/13/23
- ▶ Drury Plaza Hotel – Disney Springs
- ▶ Members pay cost – \$249
- ▶ Includes breakfast, cocktail reception and wifi
- ▶ <https://taxrepllc.com/2024-summit>



Certified Tax Representation Consultant

- ▶ Get Certified
- ▶ Members >1 year get 50% discount (so \$497.50 instead of \$995)
- ▶ Members >2 years its FREE
- ▶ <https://taxrepdirectory.com>



Partnerships



Partnership with RC Reports

- ▶ Reasonable Comp Reports
- ▶ S Corp and C Corp Clients
- ▶ Create an annuity stream
- ▶ <https://trn.rcreports.com/>



Partnership with NiceJob

- ▶ Get reviews, automates the follow-up
- ▶ Auto-Post 5-star reviews
- ▶ TRN went from 80 five-star google reviews to 170!
- ▶ <https://nicejob.partnerlinks.io/tax-rep-network>
 - ~ Use Code **TRN50**
- ▶ Save 50% off the first 3 months



Partnership with Ignition

- ▶ Onboard your clients
- ▶ Automate the process
- ▶ Use our templates and letters
- ▶ <https://ignitionapp.info/TaxRep>

~ Use **taxrep-1** for 50% off 3 months on Pro/Pro Plus Plans



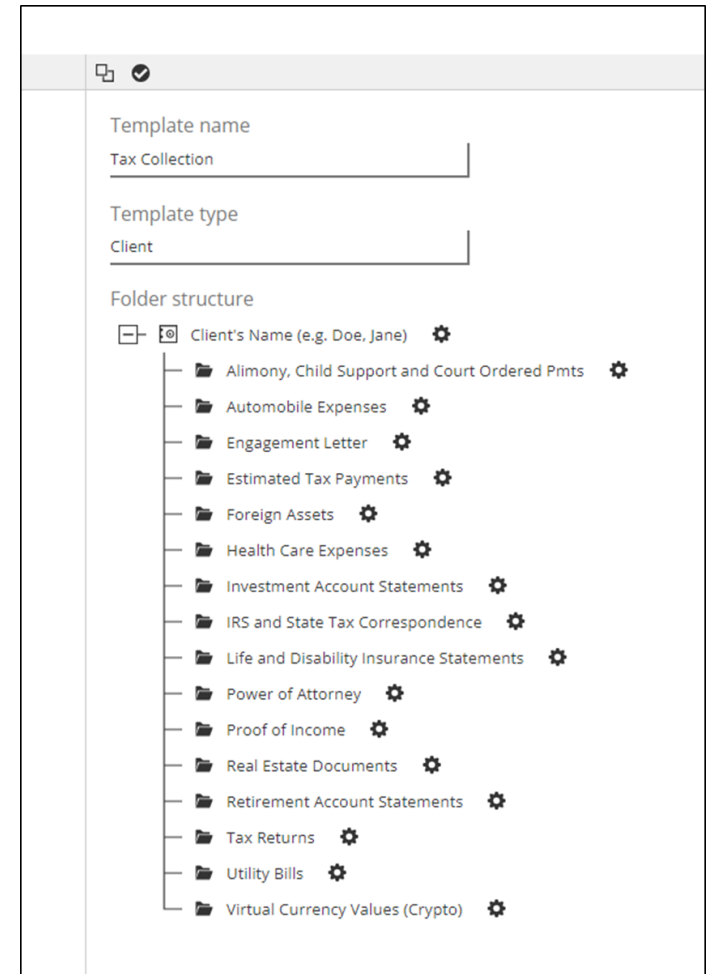
Partnership with Tax Help Software

- ▶ <https://TaxHelpSoftware.com/trn>
- ▶ Fully loaded executive license - first 6 months for \$250

**Tax Help
Software™**

SmartVault

- ▶ <https://smartvault.com/eric-green/>
- ▶ 20% off their basic 2-person license
- ▶ Ask the rep for the Tax Rep Folder Templates

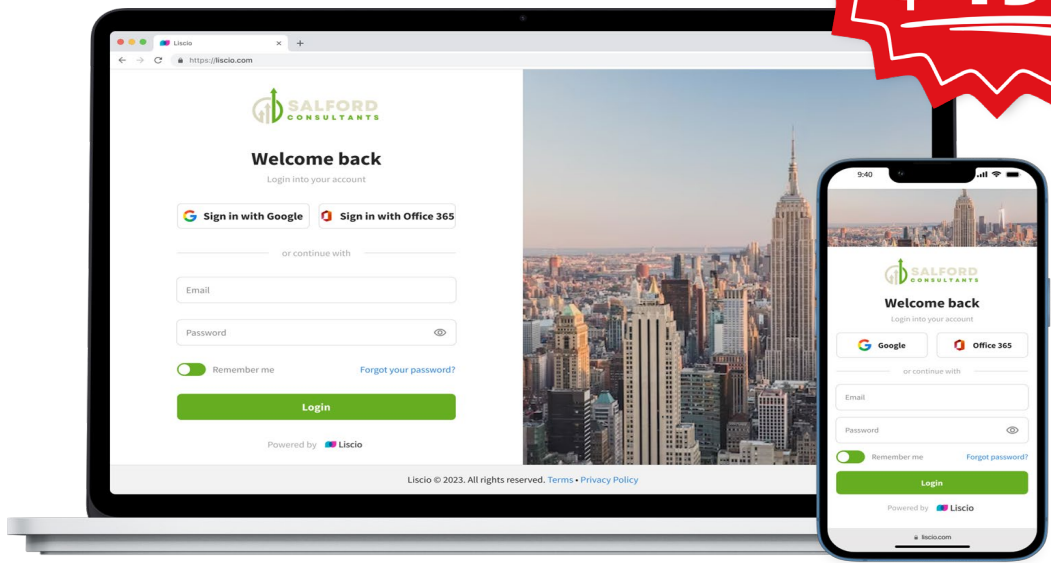
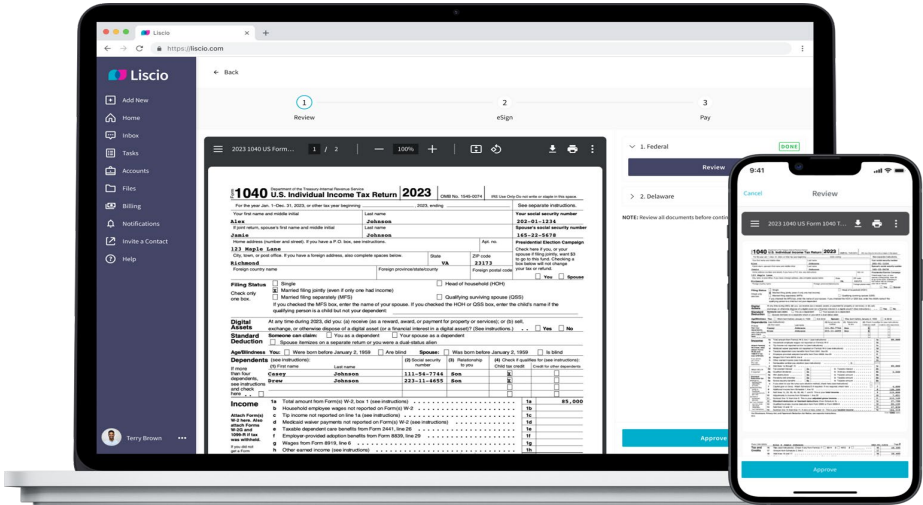


- ▶ Stop wasting time doing admin work. TRN members are reporting 60% admin time savings
- ▶ Security: for all the reasons you're so good at explaining
- ▶ Client experience matters: CX is the top differentiator for firms
- ▶ Now is the time: The absolute best pricing anywhere. And only TRN members can lock it in for 3 years.

TRN Special –

<https://www.liscio.me/affiliates/tax-rep-network>

For Only
~~\$1,499~~
\$499



Implementation, training, data import, and custom branding for \$499 (save \$1,000!)

Liscio

- ▶ **Exclusive Setup Pricing:** Just \$499 for full branding and US-based implementation services.
- ▶ **Special pricing for Pro Seat Licenses:** \$50 per month, per seat (normally \$60).
- ▶ **20% Off Smart Tax Organizers:** Pay only \$4 per organizer (regularly \$5). Includes prior-year document request list and interactive questionnaires.
- ▶ **20% Off Smart Tax Delivery:** \$4 per delivery (regularly \$5), with optional knowledge-based authentication for just \$2 per return. Includes tax return walkthroughs, automatic signature placement, payment voucher walkthroughs, and quarterly estimated tax reminders.
- ▶ **Three-Year Price Freeze:** Secure these special prices for 3 years with no increases on subscription or tax automation prices. (Applies only to Pro licenses and tax automation features noted above.)
- ▶ **Price Protection for Early Sign-Ups:** TRN members who previously signed up still qualify for the 3-year price freeze and automation discounts.
- ▶ **Act before December 15 to take advantage of this special offer!**

\$100,000 Challenge

- ▶ Monthly talk
- ▶ Keep your efforts moving forward and create some accountability
- ▶ All past monthly challenges are recorded in the members area!



Monthly Sessions: Wednesdays

- ▶ 2nd – Case Study
- ▶ 3rd – Marketing
- ▶ 4th – Q&A



Tax Rep Social – Are You On?

The screenshot displays the TRN Tax Rep Network social media interface. On the left, the 'Members' section shows three profiles: Eric Green (joined Feb 2023, active now), Kevin Cuozzo (joined Feb 2023, active 2 days ago), and Kle... (joined Jan 20...). The main navigation bar includes HOME, MEMBERS, FORUMS, and GROUPS. A central grid of 12 topic cards is visible, including Audits, Bankruptcy, C & C (Cocktails & Cigars), Conferences / Events, Criminal, Ethics, Innocent Spouse, Installment Agreements, Marketing, Member Ideas / Insights, Non-Filers, and Offers-in-Compromise. On the right, the 'Groups' section features three membership tiers: TRN Legal Members (Public, Active a week ago), TRN Platinum Members (Private, Active 2 months ago), and TRN Gold Members (Public, Active 2 months ago). Each group has a 'Member' button.

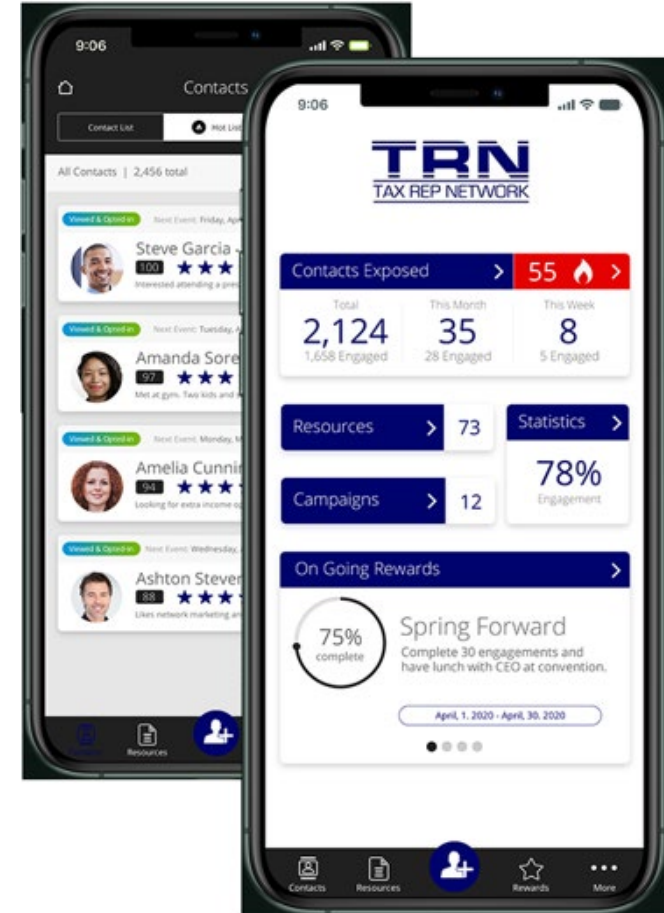
Tax Lien Database

Lien Lists by State

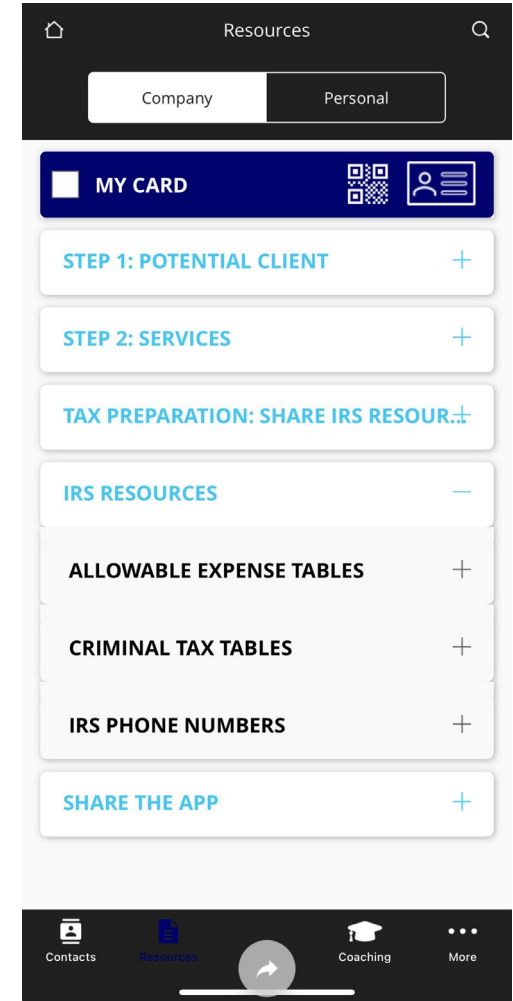
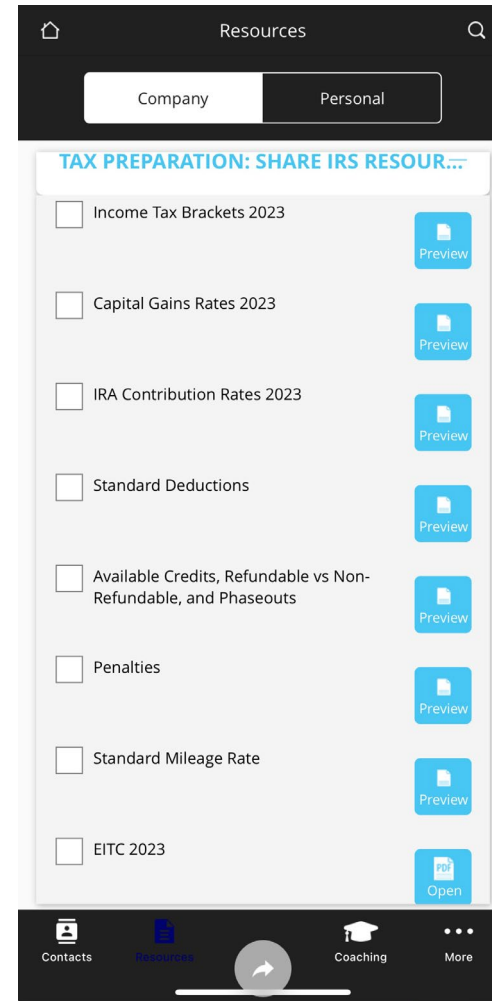
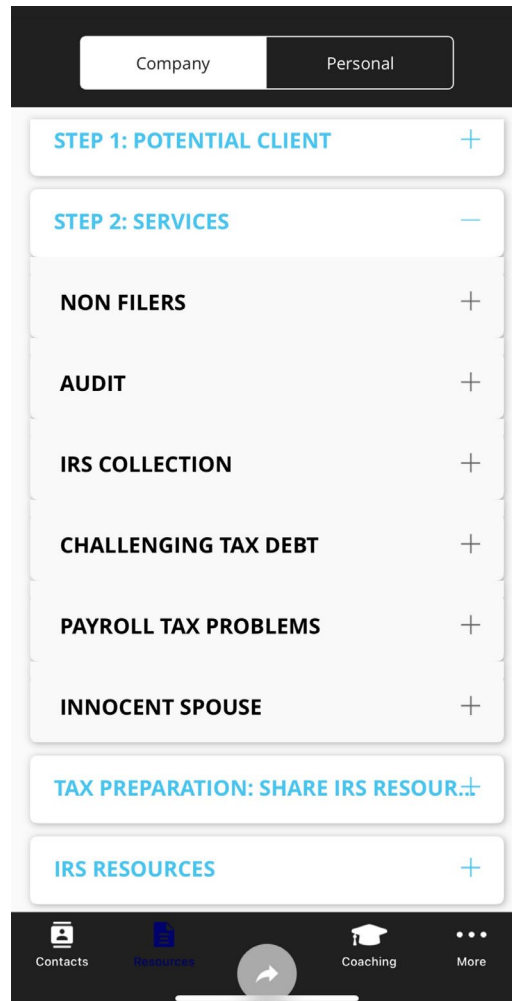
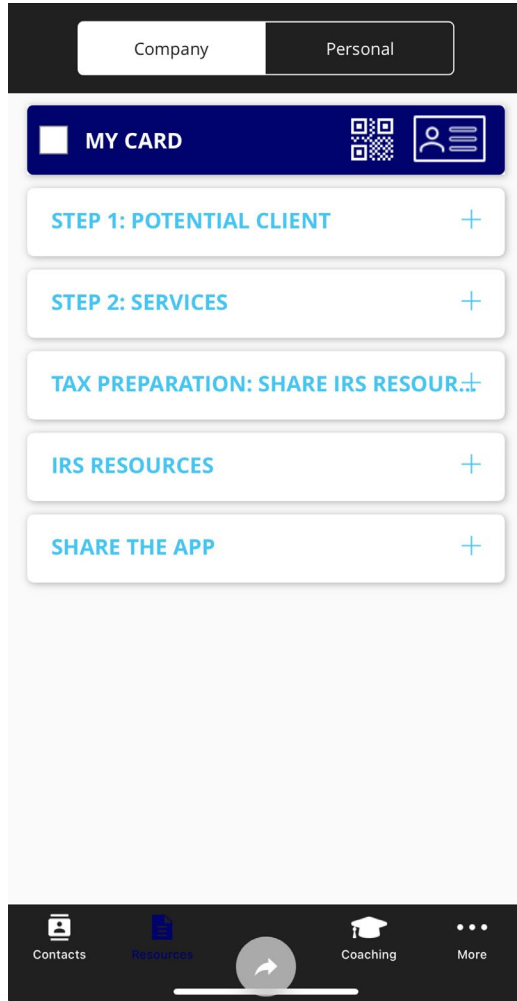
- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- Florida
- Georgia
- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virginia
- Washington
- Washington, DC
- West Virginia
- Wisconsin
- Wyoming
-
- Canada
- Puerto Rico

Tax Rep App

- ▶ Free version
- ▶ Includes all the tax tables and rep expense standards
- ▶ Marketing drip campaigns are in the premium version!
- ▶ Download app “Rapid Funnel” then use group code TRN



The App



New Checklists, Letters, Forms

- ▶ Added over 60 new letters and forms this year
- ▶ New accounting firm retainer agreements for tax preparation, tax consulting, IRS audits, IRS collection, etc
- ▶ Updated client checklist of documents
- ▶ In the Members Area under the various training sections

Questions for us?

- ▶ Use the Help Desk button in the member's area
- ▶ Messages go to Eric, Jeff and Amanda
- ▶ Respond within 24 hours, usually within 2 hours

Member Area Quick Links

Members Area Home

Getting Started

Training Area

Checklists, Letters, and Forms

Help Desk

Member Benefits

Calendar

Platinum Master Mind Group

- ▶ Will do an info session Monday 11/4
- ▶ We will auto enroll members
- ▶ Designed for people looking to break through on their practice
- ▶ Requires an investment of time and money

What have our Platinum Folks Done?

- ▶ Launched the Midwest Tax Rep Conference
- ▶ Launching a marketing product
- ▶ Launching an automation consulting practice
- ▶ Launching a roundtable series for unenrolled preparers

Questions?

