

Strategies to Grow Your Practice & Reach More Clients

Indianapolis, IN
2nd Annual Midwest IRS Representation Conference
Manny Vetti - Co-Founder of TaxCure
10/25/24





Manny Vetti, III (TaxCure Co-Founder)

- -Manages SEO Services & TaxCure
- -Former Accountant
- -Former Tax Resolution Firm Owner
- -17+ Yrs of Tax Res Marketing
- -Avid Kite Surfer/Fisherman



Charles Corsello, Jr, EA (TaxCure Co-Founder)

- -Manages Google Ads Services & TaxCure
- -Former Tax Resolution Firm Owner
- -17+ Yrs of Tax Res Marketing
- -Former Google Employee
- -Hockey Player, Now Soccer Dad

What is TAXCURE

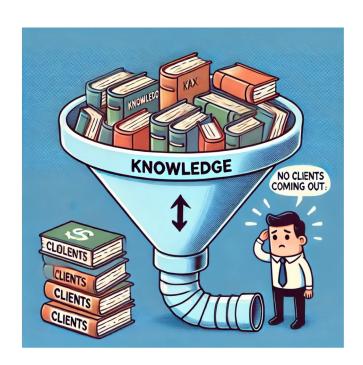


- TaxCure.com Largest & most trafficked directory/search engine of tax resolution professionals
- Created because taxpayers prefer local tax representation and it was hard to find
- Complete turnkey marketing solution for tax professionals
- We do the SEO & PPC & other marketing to drive you clients!
- Brand Reinforcement for you as a professional & your company
- Get found by taxpayers needing help. Free to Join & Get Free Leads.
- Upgrade Option Available With Special Discount at the end of our presentation
- Our goal is to make the market better for pros and taxpayers

Knowledge Isn't Enough: Struggle to Get clients

- Thousands of cases worked at large firms
- Expert in tax resolution, but struggled to attract new clients when going independent.
- Knowledge doesn't equal leads
- Most important element for success: Leads!







Today's Roadmap: Marketing for Tax Pros

- Understanding the Importance of Leads
- Building a Strong Online Presence
- Lead Generation Strategies
 - Search Engine Optimization
 - Paid Ads
 - Social Content
 - TaxCure
- How TaxCure Works
- Optimizing your TaxCure profile for Success
- Digital Marketing Q&A





Key Factors in Client's Hiring Decision

- Your Location: Taxpayers Prefer Local Experts
- Your Experience: Expertise Matters
- What Others Are Saying: Reviews
- Can Clients Find You? Visibility is Key



Location + Experience + Reviews + Visibility = Consistent Leads



The Building Block of a Thriving Practice: Leads

- Leads are the foundation of a successful tax resolution practice no matter how much experience or training you have.
- Understanding Leads
 - Referral Leads High Closing, but limited
 - Digital Marketing Leads Expanding Your Reach!
- Diversifying Your Lead Sources





Key Considerations for Your Online Visibility

- Well Optimized Website
- Optimize Key Business Profiles
- Build Social Media Profiles
- Consistency Across Platforms
- Encourage and Manage Reviews





The Basics - Optimizing Your Website



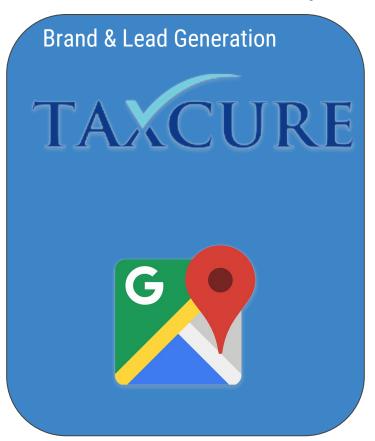
- Optimize for Your Brand
 - Company Name & Key Employees
- About Pages & Who You Are
 - Experience & Expertise
 - Photos, Videos (Trust)
- Problems & Solutions
 - List common problems you solve
 - List services that relate to problems
 - Dedicated pages for each service
- Location Information
 - Primary office address prominently
 - Integrate Google Maps widget
- Mobile Optimization

- Clear Calls-to-Action (CTAs)
 - Visible CTAs each page
 - Book & Consultation
 - Call Us
- Trust Symbols
 - Associations
 - Third Party Review Sites
- Fast Loading Speed
 - o Optimize images & Speed
 - Users & Search Engines
- Blog
 - Add new content & Updates



Optimizing Business Profiles - Directory & Social

Brand Reinforcement TAXCURE YouTube TikTok



Hybrid
Potential Lead Generation



Collect and Manage Client Reviews

- Reviews Essential for Tax Resolution
- Builds Trust: Customers rely on reviews
- Boosts Conversions
- Increases Visibility
 - Google Business Profile
 - TaxCure
 - Algorithms/Engagement
- Counteracts Negative Reviews
 - o Don't let fear of negative reviews hold you back
- Collecting Reviews
 - Timing Matters
 - Make it Easy
 - Use Templates & Reminders
 - Show Appreciation
 - Respond to Reviews





Digital Lead Generation in 2024: What Works?

- SEO (Search Engine Optimization)
 - Local Onsite SEO
 - Google Business Profile (GBP)
- Pay Per Click Advertising (PPC)
 - Google Ads
 - Local Service Ads (LSAs Best for Attorneys)
 - Microsoft Ads
 - Social Media Ads
- Social Media Content
 - Youtube Educational videos
 - TikTok, Instagram Reels, Youtube Shorts
- Email Marketing
 - Drip campaign to Leads
 - Existing client emails
- TaxCure: Amplifying Your Digital Strategy







How TaxCure Works & How to Make It Work for You

How TaxCure Drives You Clients

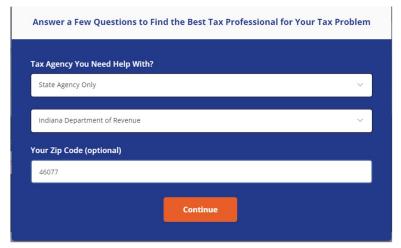


SEO Driven Traffic

- Thousands of website pages
- Targeting specific niches
- On staff SEO experts
- Pay Per Click Traffic
 - Paid ads to drive leads & brand awareness
 - Remarketing (You probably see us on FB)
- Growing Reputation
 - Several State Agencies refer taxpayers
 - LITC's referring unqualified taxpayers
 - Reddit strong following to steer taxpayers away from national and mentions TaxCure
- Social Media
- And Growing....



How TaxCure Works





TaxCure Search Feature

- Location
- Agency/Agencies
- Tax Problem

Filter By

- Solutions
- Tax Types
- Reviews
- License Type
- Languages & More

Returns Only Pros With That Experience



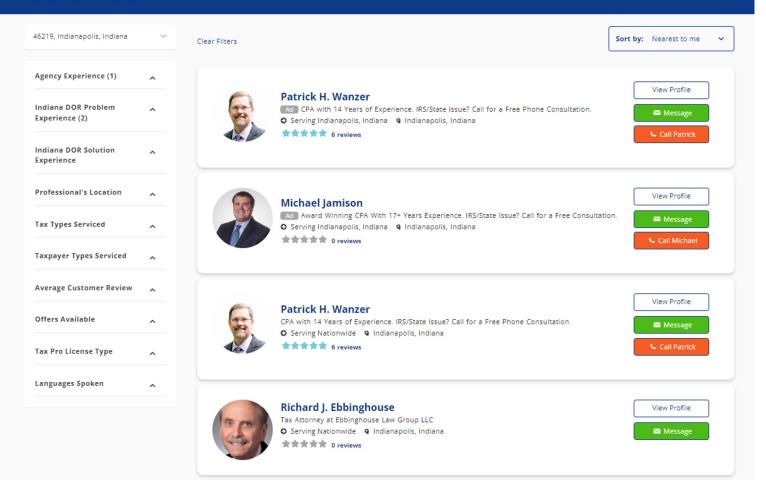


ocal Tax Pro Understand Tax Issues & Solutions >

Search... Q

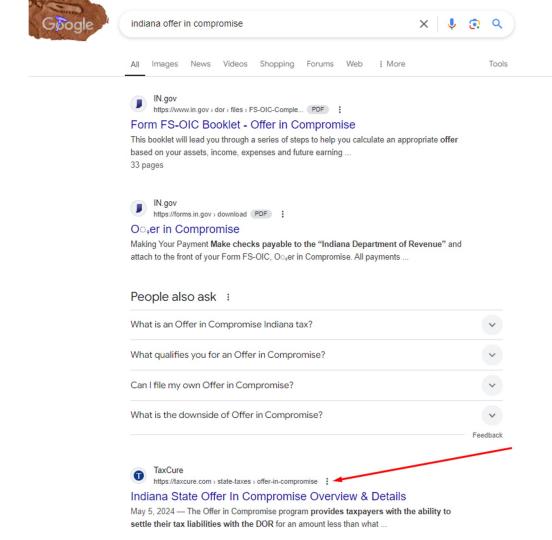
For Tax Professionals

Search Tax Professionals



Sample Search

- ●Top 2 Pro Members
- Pro Members double listing
- Followed 10 Organic Listings
- •Last two Pro Members
- •If no zip is defined, then goes off of IP address
- Pro Members Get a call button
- Pro members get a custom byline
- •60% of inquiries are via phone on TaxCure



Content Page Example

- Sample Google Search for "Indiana Offer in Compromise"
- TaxCure targets topics from various angles based on experience of tax professionals.
- Always expanding based on pro feedback and system submissions of new problems, solutions, tax types, and tax agencies
- Drives users with tax problems to TaxCure
- Allows users to search for tax professionals that have that unique experience



Find a Local Tax Pro

Understand Tax Issues & Solutions V

Q

Call for assistance 866-517-7550

For Tax Professionals

TaxCure >> State Taxes >> Indiana >> Offer in Compromise

Updated: May 5, 2024

By: Charles P. Corsello, EA | Reviewed by: Tammy L. Graham, EA

Indiana State Offer In Compromise Overview & Details



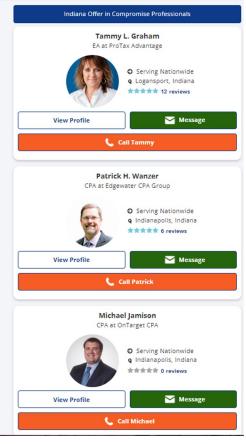
Indiana's Department of Revenue has a division called the Taxpayer Advocate Office (TAO). This office handles the Offer in Compromise program. The Offer in Compromise program provides taxpayers with the ability to settle their tax liabilities with the DOR for an amount less than what they owe. The financial condition of the taxpayer and their tax situation determine eligibility. In other words, if a taxpayer can pay in full, then they likely will not qualify. The Department of Revenue states that the taxpayer's total taxes owed and their earnings potential are all factors in determining whether an offer is reasonable.

Eligibility Requirements

Indiana's DOR provides three possible examples of taxpayers who may qualify for an Offer In Compromise:

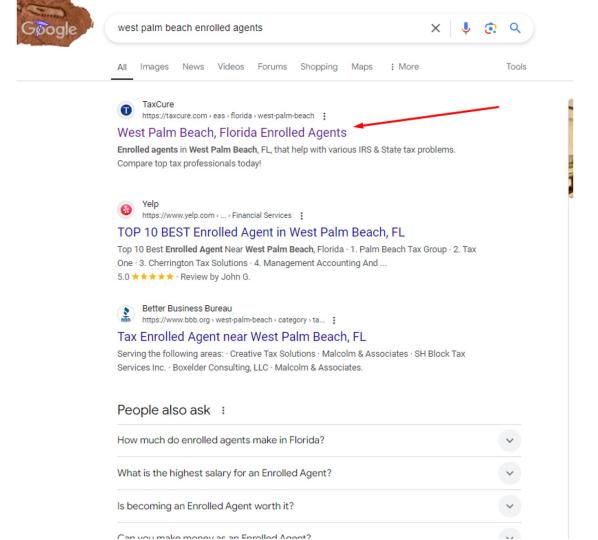
- · If the taxpayer encountered personal devastation due to a natural disaster or an economic event beyond their control
- · If the taxpayer currently suffers from a significant sickness or an immediate family member does
- · The taxpayer presently faces financial hardship or has financial problems





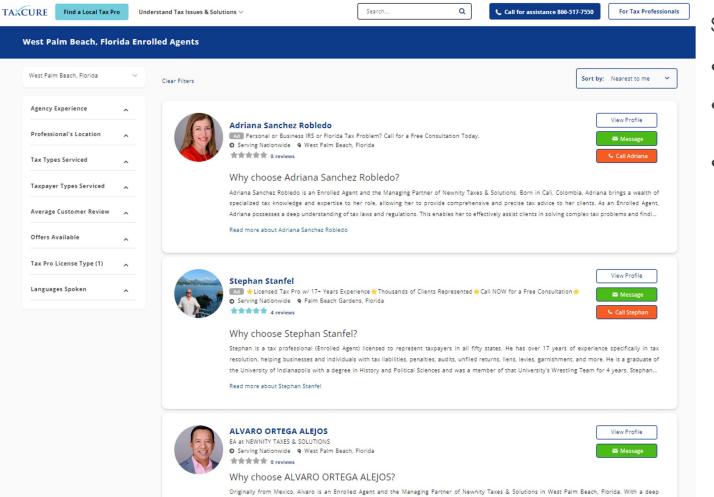
Content Page

- Only Pro Members Shown
- Based on Location. Experience, Reviews
- This Page, only pros with Indiana OIC experience
- Shows 5 most relevant tax professionals based on algorithm
- All pages have search widgets to drive organic search to further filter
- Hundreds of pages on various IRS & State related topics



Location Page Example

- Pages based on designation type to drive local traffic to tax professionals
- Pages for:
 - Enrolled Agents
 - CPAs
- Tax Attorneys
- Tax Resolution Services (All Pros)



Read more about ALVARO ORTEGA ALEIOS

commitment to helping clients navigate complex tax issues, Alvaro specializes in penalty abatement, payment plans, offers in compromise, hardship arrangements, innocent spouse relief, unpaid taxes, tax penalties, tax audits, garnishments, levies, and more. He has expertise in representing taxpayers ...

Sample GEO Page

- Shows SEO friendly search results based on location
- TaxCure Pro Members top 2 spots based on location, even if not located in that specific town
- Lists all pros matching that designation, sorted by location. 10 Pros on each page.

How To Have Success With TaxCure

- Complete Your Profile
- 80%+ For Best Results
 - Add About Section
 - Agencies You Help With
 - Tax Problems Experience
 - Tax Solutions Experience
 - Tax Types You Service
 - Taxpayer Types Serviced
 - Education
 - Associations & Memberships (TRN)
 - Tax Resolution Work Experience
 - Pricing and Offers Section
 - Contact Information (phone, website, location etc)
 - Publications
 - Photos
 - Get 5 Peer Reviews
 - Get 5 Customer Reviews
- Help? Book Onboarding Call With Us! Free for all members

Your profile is 34% complete

Complete your profile to get better visibility in searches and help customers understand your services.

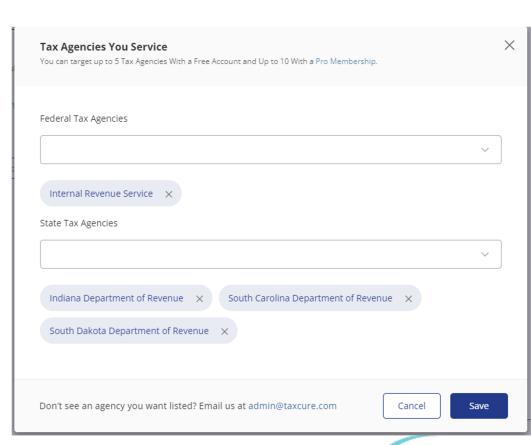
How to improve your profile:

- Add About Section 50 to 500 words
- Specify the Tax Agencies you Service
- Complete Tax Solutions Experience
- Complete Tax Problems Experience
- Specify the Tax Types You Service
- Get at least 5 Customer Reviews
- Update Tax Resolution Work Experience
- Get At Least 5 Peer Reviews
- Update Pricing and Offers Section
- Add at least 5 Publications
- Add up to 5 Photos and/or Videos



How Tax Agencies Work

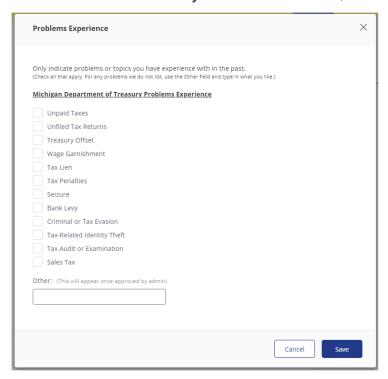
- Basic Account: Select up to 5
- TaxCure Pro Account: Select up to 10
- Select problems for each agency
- Select solutions for each agency
- Check back for more problems and solutions
- Show for searches related to Agency for those specific problems and solutions selected

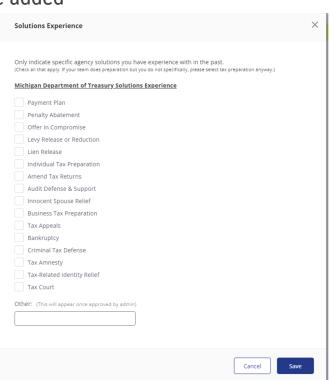




Problems & Solutions

- Section populates a problems and solutions selection area for each agency you select
- Select all that you have experience with
- Check back every 6 months or so, as new items are added





Getting TaxCure Reviews

Send Review Request to Past Tax Resolution Clients

3 Options to Request

- Personalized Review Link
- Send via TaxCure Platform
- Use a Generic Review Link

Personalized Review Link

 You select agencies, problems, solutions and they complete basic information. You send via your trusted email

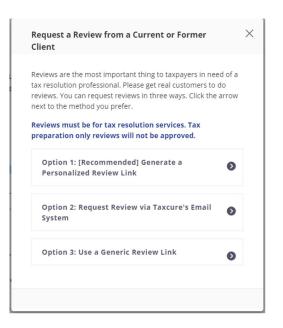
Request via TaxCure's Email

 You select agencies, problems, solutions and they complete basic information. TaxCure sends email

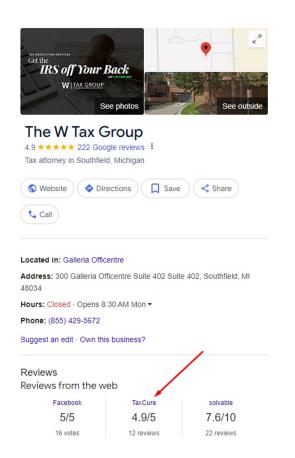
Generic Review Link

 You email link, taxpayer completes all required selections related to help you provided.

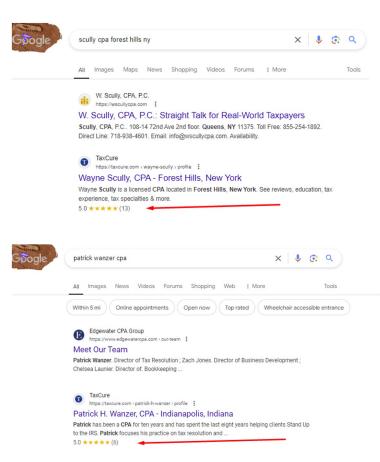




TaxCure Reviews Show in GBP & Branded Search Results

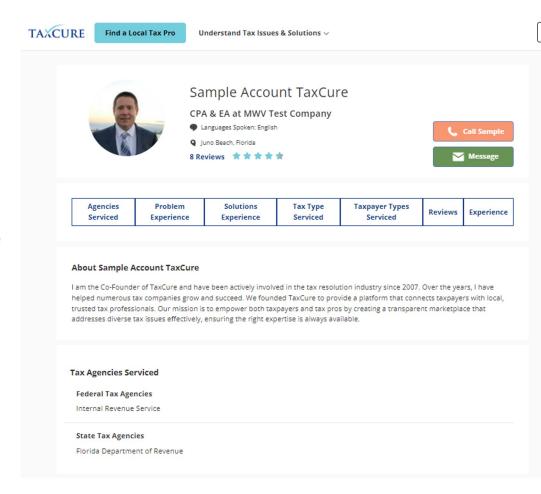






Completed TaxCure Profile

- Above 50%, Gets Indexed by Google
- Above 70%, Gets Shown in TaxCure Searches
- Get Found by Taxpayers Most Likely to Hire You
- Reinforce Your Brand & Help Conversion Rate
- Get Messages Directly through TaxCure
- Showcase your skills and expertise





TaxCure Testimonials/Mentions



peter salinger

5 reviews • 0 photos



**** 14 weeks ago

I have been with TaxCure about one year. It is an excellent resource for people with tax issues to find qualified individuals to help them. If you are a representative don't think twice about joining. It will pay for itself in the quality leads you will get. Manny and Charlie have put together an exceptional product for the tax resolution industry.



WAYNE A. SCULLY

Local Guide • 57 reviews • 52 photos



★★★★ Oct 13, 2023

As tax pro, I really appreciate the folks at TAXCURE. They have been instrumental in me reaching my 2023 goals. I was hesitant about buying the subscription service, but I am happy I did because for the 1st half of 2023, I saw my Return On Ad Spend, increase to 6:1. Meaning for every dollar I spent advertising through there directory, I received \$6 back. That's the best return I have ever had with advertising. So, if you are a tax pro looking to scale up your tax resolution business, you gotta have TAXCURE in your arsenal, i.e., part of your marketing plan...I highly recommend this service.



Matthew Laskovics - July 31, 2021 - 😝

Hi Everyone, if you haven't signed up for www.taxcure.com yet I STRONGLY recommend it. I've been getting multiple leads from there for tax resolution cases and the owners Manny Vetti & Charlie Corsello are great to work with and are really helping us tax pros out. Its super easy to use and to get a profile set up. As a 14 year CPA, this is the best avenue I've experience for tax rez leads. Anyone looking for tax cases should 100% use this free service!



Aee Tikningad 'Rhenend.. Author * Rising contributor

Discostant Militaria I'll make \$20k off of this case by the time it's all said and done. \$14k for 12 years of tax returns, required by irs and state and bc of SFRs creating huge balances, \$3k for initial discovery and \$3k for conferences with irs. The returns ended up fixing most of the issues.

w Like Reply Edited



Rising contributor

Leretcrc fethett oh and this client came from tax cure right after we got back from Denver. Thanks Manny Vetti!!

1w Like Reply







★★★★ Sep 2, 2022

The TaxCure Team has been GREAT to work with. My first interaction with them was over a year ago and I felt confident they could help me with lead generation. I was not wrong. Being Enrolled Agents, like myself, they understood the industry and the type of clients I was looking to help.

Charlie and Manny offered positive feedback for my profile and have personally answered questions and concerns I may have had. They have a wealth of marketing insight.

TaxCure has proven to be an valuable referral tool to my office and again their team goes above and beyond to ensure we are getting the best results.

Benefits of TaxCure Pro Membership

- 1. Increased Visibility
- 2. Top Placement in Search Results
- 3. Exclusive Visibility on Content Pages
- 4. Click-to-Call Button for Easy Contact
- 5. Instant Notifications (sent via text & Email)
- 6. Access to Premium content
- 7. Profile Analytics
- 8. Social Media Integration & Website Link
- 9. Removal of Similar Profiles from Profile Page
- 10. Custom Byline for Enhanced Branding
- 11. Average of 1600% More Inquiries than the Basic Membership



https://taxcure.com/member/professionals/plans-and-pricing



What to Expect With TaxCure Pro?



- Average Professional Who Upgrades Gets a 5x ROI (ROAS)
- 12-Month Agreement for Pro (Resolution Leads Come in Waves)
- Can't Base Results on 2 or 3 Months
- Google Ads, YouTube Ads and Meta Ads Launched
- Underpriced for Sure --- Lock in Current Pricing Now
- MIDWEST25 Get 25% off Promo Code (Applies to Monthly Membership Cost Not Annual for 12 months)
 - \$199.99 a month Discounted to \$149.99 for first year!
 - Or Prepay for year option of \$1,999.99 per year

Your Plan for Success: Building a Repeatable Client Acquisition System

Build and Optimize Your Online Presence

- Website optimized for SEO
- Business Profiles (e.g., TaxCure, GBP)

Social Proof and Reviews

- Systematically collect & showcase client reviews on key platforms
- Respond to reviews and engage with clients to build trust

Engage Your Audience

- Produce education content: Youtube, blogs, social media
- Use social media to build and maintain client relationships

Automated Processes

- Automate email follow up, text follow up, requesting reviews
- Remarketing to capture lost clients on your site

Monitor, Adjust, and Scale Your Efforts

- Track the performance of your strategies
- Refine your approach based on what works and scale successful tactics

Generate Quality Leads Consistently

• Drive qualified traffic through these integrated efforts to create a consistent flow of new clients.





Email TaxCure

taxpros@taxcure.com

866-571-7550 TaxCure LLC

Sign Up Free: https://bit.ly/trntc or go to TaxCure.com

Discount for 25% Pro Membership: MIDWEST25 Expires 10/31/24

