

10 STEPS TO STARTING A TAX BUSINESS

#1 CALL US ~ It all starts here. This is an opportunity that can change your life. This is an amazing business built on relationships and that 1st relationship is with us. We are the gateway to all of your needs. We are here to answer all of your questions and explain to you everything in detail.

#2 PACKAGE ~ Chose the package that best meets your needs. With packages as low as \$299 this business is affordable for everyone.

#3 APPLY FOR YOUR PTIN ~ We will provide you with instructions on how to apply and explain the IRS's requirements. If time permits apply for an EFIN. An EFIN requires 8 to 12 weeks processing time- If there isn't enough time, don't worry- we can provide Efile services through our approved partner.

#4 DECIDE YOUR LOCATION ~ We will help you determine where you should locate your business based on real data and demographics. You may opt to open your own retail location, co-op with an existing business or work from a home/virtual office.

#5 START SOFTWARE AND TAX TRAINING ~ attend training as many times as you would like- we want you to be 100% comfortable by the time you have a client in front of you. For some this may be 1 time ...or 20!! We have live webinars 4 times a week.

#6 COMPLIANCE TRAINING ~ Ever wonder what "bank products" are ? Learn how to offer no out of pocket expense to your clients! You will be provided with a full line of bank products. That means your preparation fee will be deducted from clients refund. You will then be able to offer your clients refund to them via the banks printed check, debit card or direct deposit. This ensures you get paid and of timely delivery of their refund. Through compliance training you will learn all of the requirement of how to offer these options.

#7 DEVELOP A MARKETING PLAN AND EXECUTE IT ~ We have a plan for you! We provide you with our "**Social Media Guide To Marketing Your Tax Business**" and essential for all offices. We also provide you with live webinars on "**How To Market Your Tax Office- Retail**" And "**Virtual**". You will want to incorporate our 3 core concepts "Who you are", " Where you are" and "What you offer" with our layered marketing plan. We kick off pre-season with a **FREE vacation** with every estimate in December. You will also be able to offer you clients with up to **\$1250 refund advance** starting January 23, 2017. Each tax payer is also entitled to receive a **7" android tablet**. These promotions are why we out produce our competition 2 to 1!

#8 THE APP ~ The "Taxes To Go" app will change your business. With our app you will be able to not only market and reach potential clients nationwide- you will be able to complete their return through a secure portal. No need for faxing or emailing sensitive documents- and when you complete the return all your client needs to do is review it on their smart phone and sign with their finger! Imagine the reach you will have not to mention a huge time saver.

#9 OPEN! ~ You are now ready to open the doors... or the "virtual" doors to your business. And we are here on standby waiting to help you with any and every need you have. We aim to have you so well prepared you may not even need us! You have now become a successful business owner!

#10 GET PAID! ~ Now its time to get paid! With the average preparation fee of \$444 last year, and some as high as \$850 you will soon know how financially rewarding this business can be!

**EVERYTHING YOU NEED ~ PROVIDED TO
YOU BY NO LIMIT TAX REFUNDS**