# Tax Rep Launch Master Class:

## Onboarding & Pricing

Eric L. Green, Esq.

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# 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.
- Has served as a columnist for CCH’s Journal of Practice & Procedure.
- 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”).
- Founder of Tax Net Network

# Housekeeping

- This is a four-hour program: one hour a day for today and the next three days
- If you miss any they are all being recorded and you will receive links to the recording to watch
- There is no ce/cpe for this class

# Schedule

- ~~Monday (Day 1): Finding Clients~~
- Tuesday (Day 2): Onboarding and Pricing
- Wednesday (Day 3): Resolving the IRS Audit Case
- Thursday (Day 4): Resolving the Resolution Case

# News on the App

- Resources being updated
- All new campaigns – from you, not me
- Negotiated pricing with Rapid Funnel
- Want to have your own executive account?  No problem
- Get the App and start using at least the free version! (Download Rapid Funnel and use group code “TRN”)

# Favor

- Please subscribe to the YouTube Channel
- Help us spread the word
- Ideas for the podcast – please send them in!

**https://www.youtube.com/@TaxRepNetwork**

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# Caveat

- Will mention what we use for tools
- You do NOT need to use them
- For 18 years of my practice this stuff didn't exist

# Onboarding & Pricing

- What we mean is getting the client signed up
- Getting paid
- Let me tell you a story…..

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# “What do you mean they didn’t pay….”

- Background on the Offer
- Right before we send it for review and signature Amanda catches this
- The client: “I’ll pay if you get this done” meaning we get the offer accepted

# Beware:

- As you get known for this people will just call for “some quick advice”
- Your knowledge is your stock-in-trade
- You are still on the hook for advice even if they don’t give you all the facts!

# How we charge

- Just to discuss: $750 (flat)
- Transcript pull and analysis: $1,500 (flat)
- RCP Analysis: $3,500 (flat)
- After RCP Analysis

  a. CNC: $1,500 ($5,000 - $3,500 RCP - $1,500)

  b. IA: $1,500 ($5,000 - $3,500 RCP - $1,500)

  c. OIC: $3,000 ($6,500 - $3,500 RCP = $3,000)

# But what if….


- Then we take a $5,000 / $7,500 / $10,000 retainer and bill hourly
- The VC start-up story….

# The basics

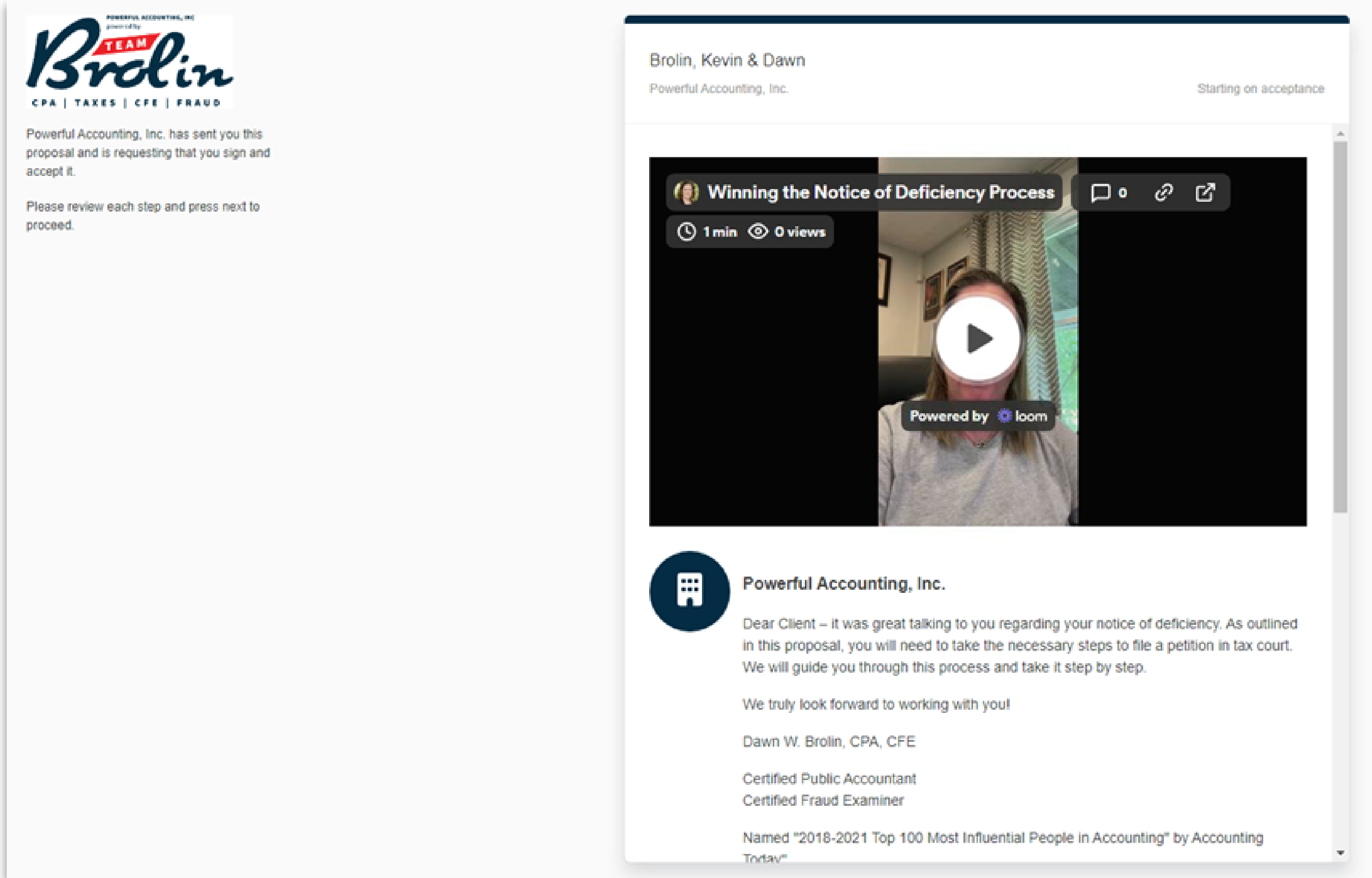
- Consult retainer agreement
- Power-of-Attorney (Form 8821) (if necessary)
- Link to get paid
- Link to upload documents

# Historically

- 22-25 contacts per year that ghosted us
- Implemented Ignition
- Down to 3
- 20 x $8,500 = $170,000 of signed engagements that we missed before

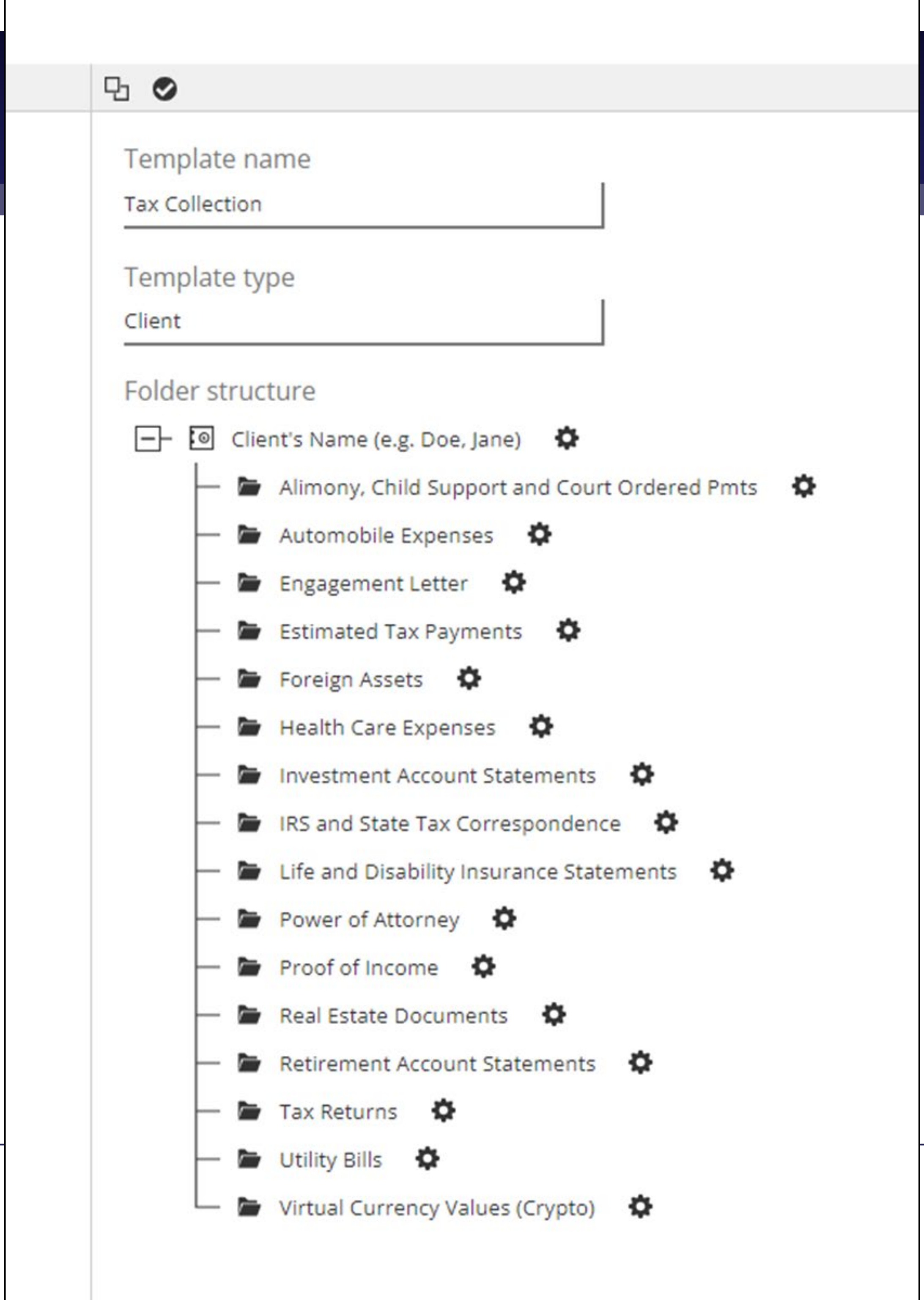
# Automating Engagement Letters

- Automated follow-up
- Get paid up front
- Avoid the double consult….

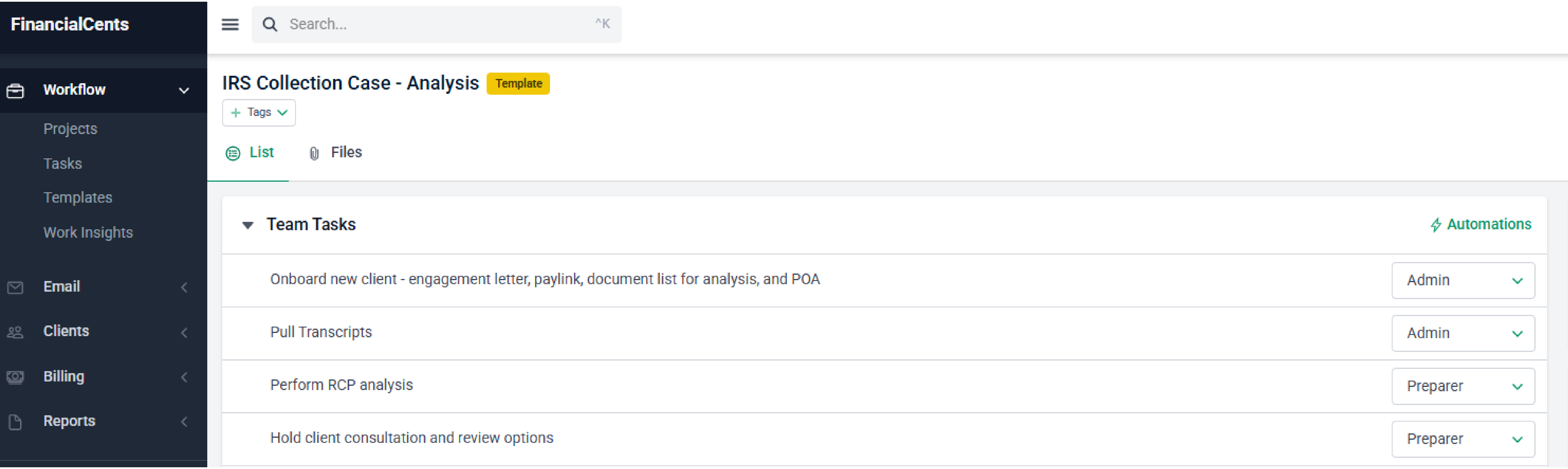


# SmartVault

- Acts as the checklist
- Alerts us when documents uploaded
- Single Source of Documents – when client says “I need a copy of ……”



# Building out Templates and Tracking

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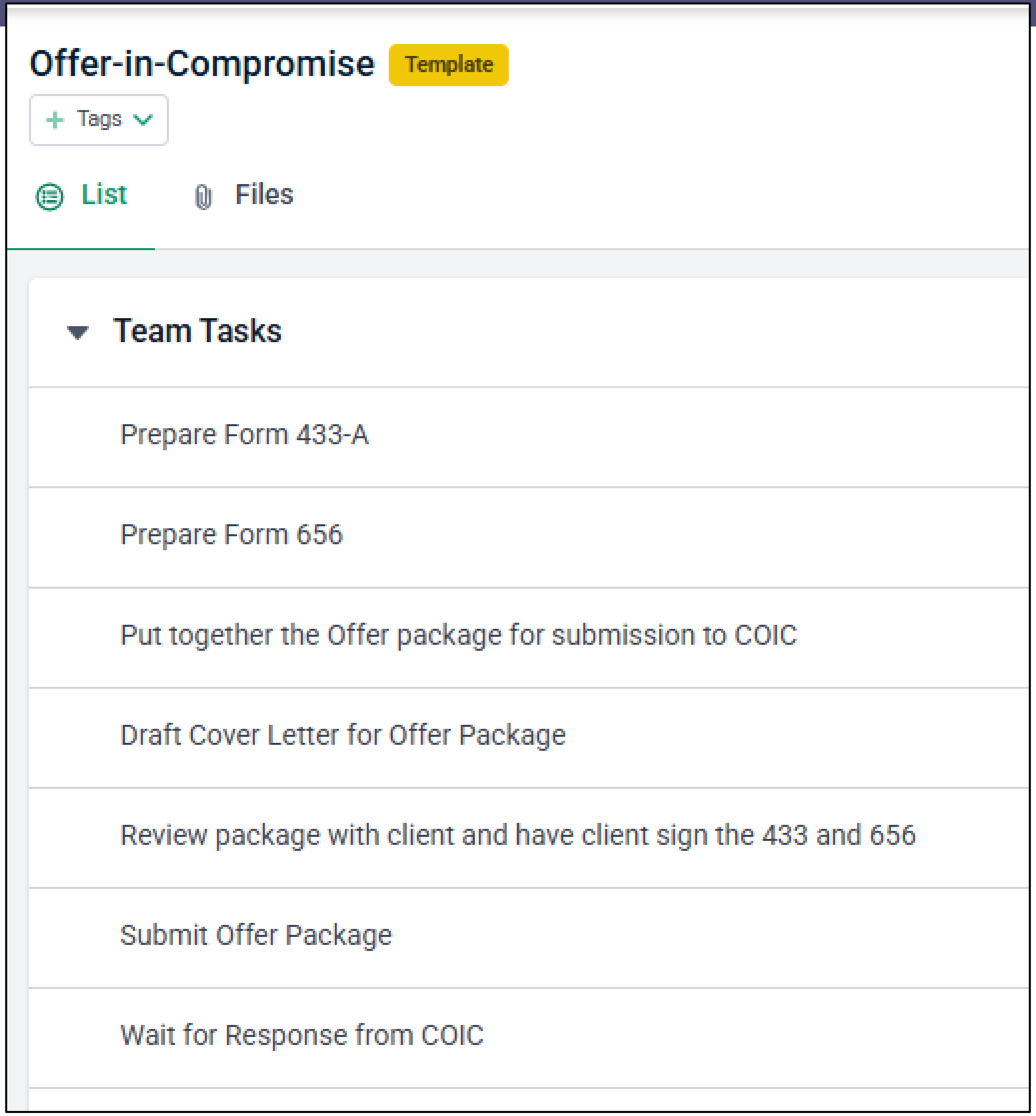
# Financial Cents

- Track all clients
- Track who its assigned to
- Track where each case is
- Financial Cents Templates act as checklist

FinancialCents



# Case is over…

- We pull POA
- Clients lose their mind!
- Where transcript monitoring came from
- Transcript monitoring agreement

# Links

- Tax Help Software - https://taxhelpsoftware.com/TRN - 6 months for $250
- Ignition - https://ignitionapp.info/3Vd6myZ - 50% off 4 months of Core and Pro plans
- RCReports – https://TRN.RCReports.com – save $400 on professional plans
- Liscio - https://www.liscio.me/affiliates/tax-rep-network
- Gruntworx - https://www.gruntworx.com/
- Financial Cents - https://financial-cents.com/

# Coming Up

- Tomorrow is day 3 – Audits
- Thursday at 1pm EST is “The State of TRN 2025”
- May 6th – Top IRS Notices, Deadlines and How to Respond with me and Jamie Flores
- https://TaxRepLLC.com and go to “Events Menu”

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# Tomorrow – Part 3: Resolving an IRS Exam

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