

Tax Rep Launch Master Class:

Finding Clients

Eric L. Green, Esq.



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

Finding Clients

- ▶ Clients are everywhere:
- ▶ More than 15 million in the IRS Collection Division inventory (including private debt collectors)
- ▶ More than 11 million non-filers identified by the IRS
- ▶ Reasonable Comp Issues for S Corps: 266,095 returns with profits greater than \$100,000, a single shareholder, and no officer's compensation claimed
- ▶ Penalty Abatement: In 2023 over 45 million returns filed had penalties associated with them for a total of \$65 Billion

The state of the IRS

- ▶ More than 14,000 employees already gone
- ▶ Includes 2,000 ACS employees that answer the phones
- ▶ IRS expected to reduce headcount by 50% by 2026
- ▶ Trying to call the IRS? Good luck – 2,000 ACS employees let go
- ▶ Taxpayer service centers? One-third are being closed



The Point?

- ▶ People will struggle to handle these issues themselves
- ▶ Professionals will be in demand who can solve these issues
- ▶ Understanding the system is critical



How do you find clients?

- ▶ Build a killer referral network
- ▶ What you need (and don't need) in a website
- ▶ Blogging and YouTube
- ▶ Leveraging AI
- ▶ Your budget

Your existing network

- ▶ There are people (presumably) that like you
- ▶ Use them to find more clients
- ▶ Nobody can refer you business if they do not know you do this
- ▶ Consider “IRS Alerts” vs a monthly newsletter
- ▶ We have a number in the members area

Marketing Letters to Send to Clients

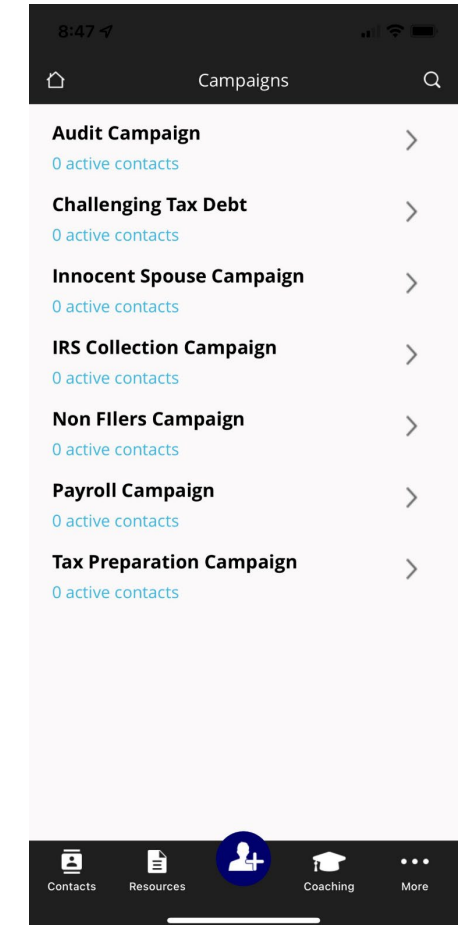
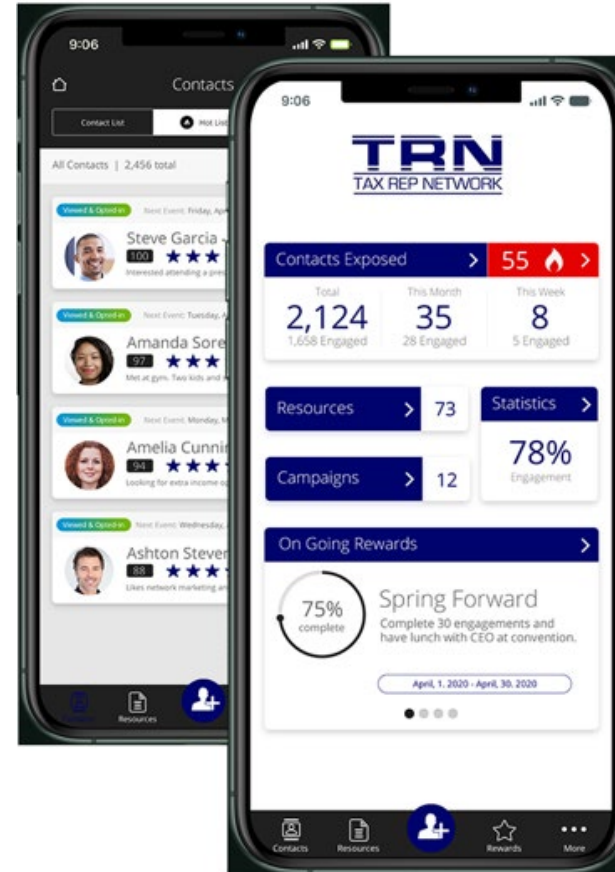
- Newsletter to Existing Clients (The Delucia Letter) (docx)
- IRS Alert – Haven’t Filed in a While (docx)
- IRS Alert – Why You Should Never Face the IRS Alone (docx)
- Letter to Clients – Seeking Refund of Penalties and Interest (docx)
- Client Alert – Letter to S Corp Clients Re Reasonable Comp (docx)
- Client Marketing Letter Re Existing Payment Plan During COVID Crisis (docx)
- Price Increase Sample Letter (docx)

Your Website

- ▶ You want a website that is optimized for mobile phones
- ▶ It needs to load quickly
- ▶ It needs to be clean and easy to read

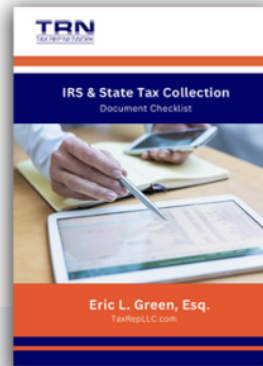
You need to capture leads

- ▶ Its one thing to send people to your website
- ▶ Its another to get their information
- ▶ Designed the Tax Rep App to do this



Sample Lead Magnets for Lead Capture

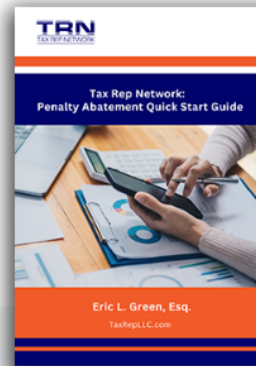
Use Tax Rep Network's complimentary resources to start building your Million-Dollar tax representation firm in these fundamental areas:



Offers in Compromise

Get the IRS & State Tax Collection Checklist to help you start earning revenue with offers in compromise.

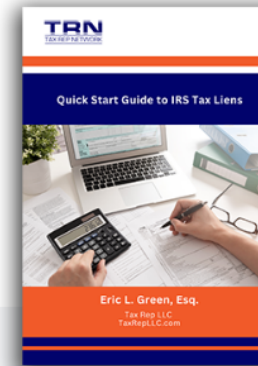
[Get My Free Download](#)



Penalty Abatement

Receive the penalty abatement whitepaper including a penalty abatement letter template you can start using immediately.

[Get My Free Download](#)



Liens and Levies

Get the TRN guide to liens and levies and start learning how to monetize serving clients who need your help in these areas.

[Get My Free Download](#)

Blogging and YouTube

- ▶ Google is the #1 search engine
- ▶ YouTube is the #2 search engine (owned by Google)
- ▶ The average American only has the attention span of 3 minutes
- ▶ Record the video and post it
- ▶ Use a transcriber to get the transcription
- ▶ Use A.I. (Chat GPT) to create a 350-500 word blog post
- ▶ Multiple ways for that content and you to be found

Example

- ▶ Record the podcast (or video)

April 1, 2025

**Is The IRS
Whistleblower Office A
Waste Of Time? With
Bryan Skarlatos**

LISTEN NOW 

Example

▶ Video on YouTube



Example

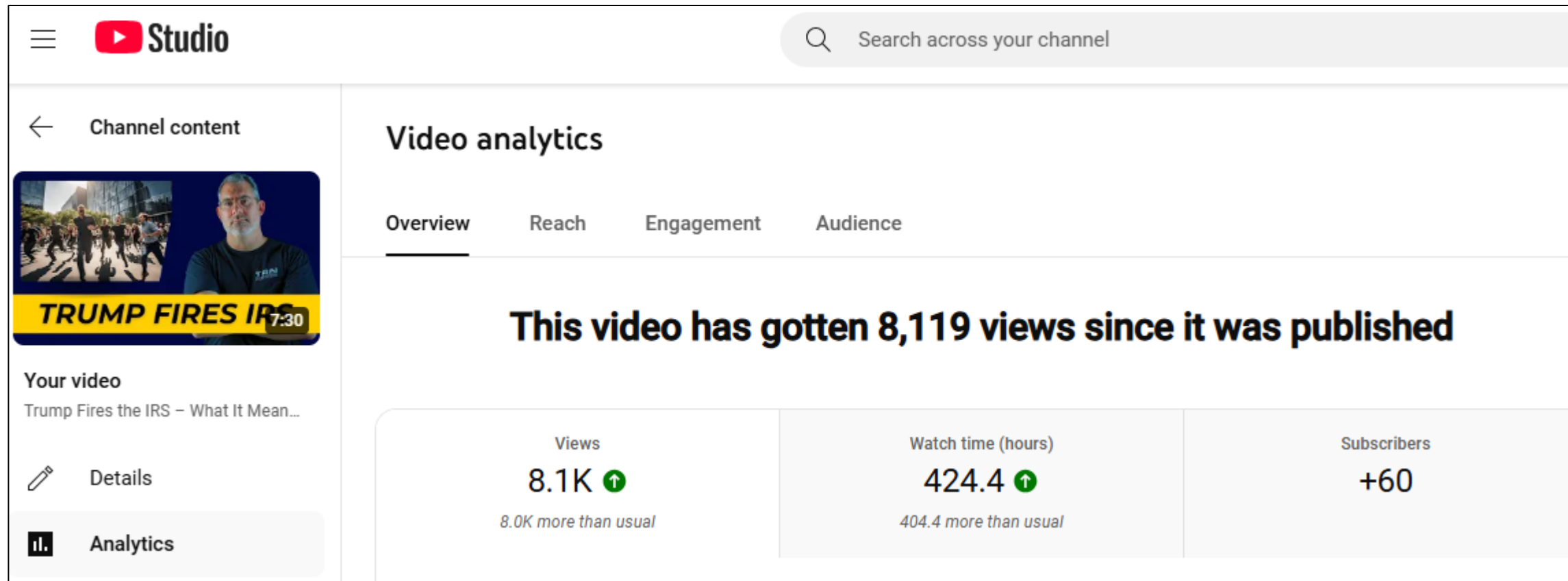
► Post the blog entry

Is The IRS Whistleblower Office A Waste Of Time? With Bryan Skarlatos

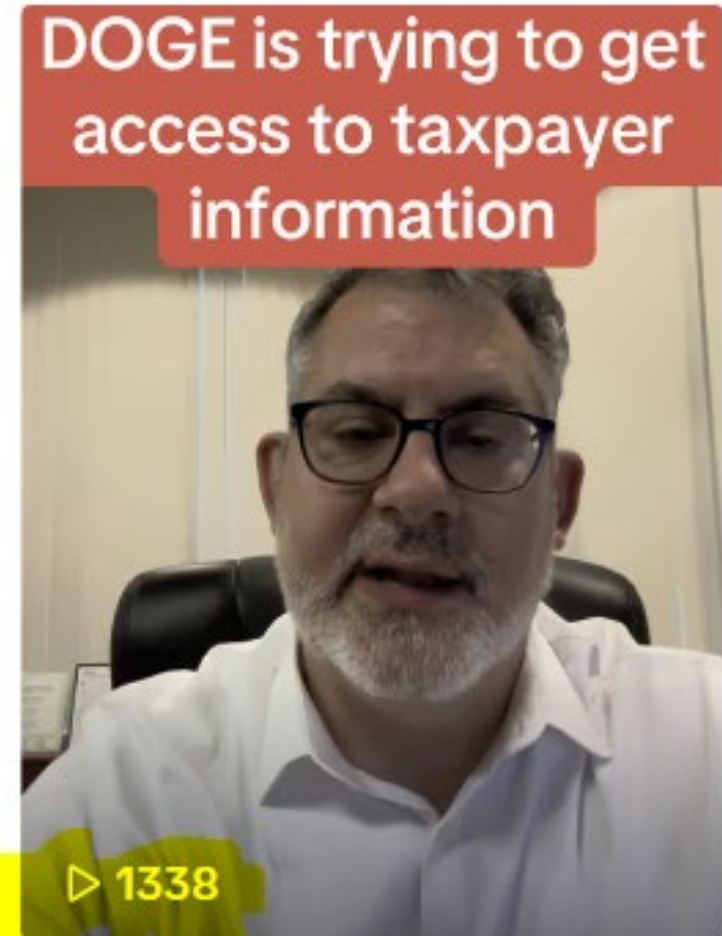
Is the IRS Whistleblower Program a complete waste of time? Maybe. I've had some great experiences with the Whistleblower Program, and I've had cases where I don't know what the heck happened. In this episode, I've invited Bryan Skarlatos, who is the Managing Partner at [Kostelanetz LLP](#) in New York. They have offices in New York and Washington. Bryan has practiced longer than I. He is at the top of our profession, someone that I have looked up to. I've tried to do a lot of things that he's done. Having him on the program is a great honor.

He has also had some interesting situations and experiences with the Whistleblower Office. What we are going to do in this episode is break down for you what we think work, what doesn't work, when is this a complete waste of time, and when should you maybe consider bringing that whistleblower case and what you need to know about it before you hit send on that form 211. Let's go meet Bryan and get into it.

Its evergreen so views increase over time



Its evergreen so views increase over time



Blogging rules



- ▶ Around 500 words
- ▶ You want your keyword density to be around 4%
- ▶ We don't teach people who to do this, we explain enough so they know we are the experts, we are the hero
- ▶ Remember Localism

Utilizing A.I.

- ▶ Artificial Intelligence allows us to create content quickly and efficiently
- ▶ Text, Videos, Photos
- ▶ You must provide it good content - remember though – garbage in, garbage out!

Cartoon Eric



Eric's A.I. Version(s)



A.I. Checklist (see handout)

- ▶ Use ChatGPT to generate video/blog topics.
- ▶ Use AnswerThePublic to find real client questions.
- ▶ Use StreamYard for added features like banners and branding to your video
- ▶ Use Loom if you're camera-shy (record PowerPoint + voice)
- ▶ Use Descript to auto-remove filler words (um, uh, etc.)
- ▶ Use Opus Clip to turn your long video into 10+ short clips
- ▶ Castmagic-generated title and description

Budget - Low

- ▶ Most A.I. programs are cheap:
- ▶ ChatGPT (Free, or get Plus is \$20/month)
- ▶ Canva (Free, Pro is \$120/year)
- ▶ Opus Clips (\$15/month)
- ▶ AnswerThePublic (\$11/month)
- ▶ Loom (Free, Business is \$15/month)
- ▶ Streamyard (\$432/year)

Tomorrow – Part 2: Onboarding and Pricing

