

Turn Compliance into Recurring Revenue

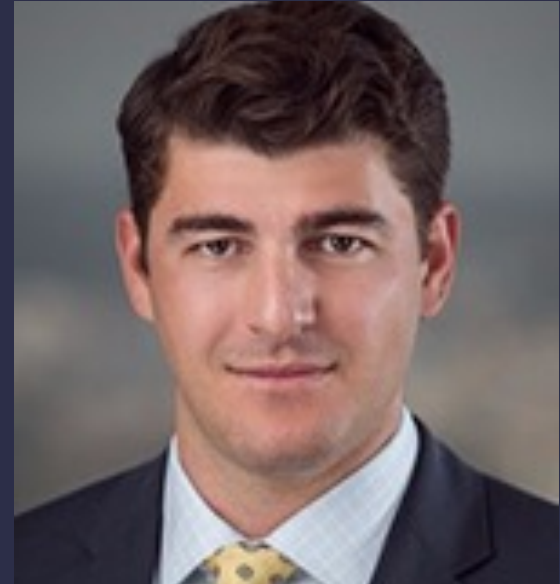
The RCReports × FileForms Workflow



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The Compliance Gap

The Gap We're Closing

Formations are not the finish line

- **State compliance:** formation, annual reports, registered agent (FileForms)
- **Federal compliance:** reasonable compensation (RCReports)

Bottom line: Many firms cover one side and miss the other. That's risk for clients and missed revenue for the firm.

Question

How many S Corps do you work with?

- A. 0
- B. 1-10
- C. 11-20
- D. 21-100
- E. 101+

Why Reasonable Compensation Matters

The #1 S Corp hot button

- IRS requires shareholder-employees to take a reasonable salary
- Documentation beats estimates every time
- Typical client impact: prevents IRS disputes; aligns payroll and distributions

Determining salary before first payroll and updating annually keeps you prepared if questioned.

Why Reasonable Compensation Matters

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End-to-End Compliance Workflow (State + Federal)

- 1 Form entity in FileForms
- 2 Schedule state items: annual report + registered agent
- 3 Gather owner duties, hours, locale
- 4 Run RCReports questionnaire
- 5 Deliver salary figure + PDF documentation
- 6 Calendar next year's state filings + RC update



Question

How many entities do you manage for clients?

- A. 1-50
- B. 51-100
- C. 101-200
- D. 200+

State Compliance You Can Bill Every Year

FileForms: keep the entity alive and compliant

- Track and file annual reports
- Registered agent renewals
- Calendar reminders and status visibility

Every formation can become predictable state-side revenue the firm bills annually.

Package It As a Subscription

Build a complete annual compliance service

- State side: annual reports + registered agent (FileForms)
- Federal side: reasonable compensation report (RCReports)
- One client, multiple recurring services, one yearly check-in

Pricing note: Most firms present this as a flat annual package with clear scope and timelines.

Implementation Playbook

Add this to your workflow without disruption

- When forming: propose the annual package alongside the new entity setup
- For existing S Corps: offer an onboarding month to catch up filings + create the salary report
- Calendar: set renewals 30–60 days before filing deadlines and salary review

Use consistent templates for proposals and report delivery.

See the Workflow in Action

Question

Which would you like to learn more about after today?

- A. RCReports
- B. FileForms
- C. Both RCReports and FileForms
- D. Neither right now

Getting Started Today

Two paths, same outcome

- Already using FileForms? Add RCReports for federal compliance
- Already using RCReports? Use FileForms to manage state filings

Thank You