



Adding Tax Resolution To Your Business...



What Is Tax Resolution...**REALLY???**

“Tax Resolution Is A Niche Service Where An Attorney, CPA or Enrolled Agent Helps A Taxpayer Resolve Their **OVERALL** Tax Problem...**WITHOUT THE CLIENT PRESENT**”

Tax Resolution Is NOT Just About “Settling” Via An OIC...

There Are MULTIPLE Ways To HELP A Client Resolve A Tax Problem And It Is All Based On The Client’s SPECIFIC Situation!!!



“The REAL solution to your tax problem”



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SOLUTIONS

Tax Resolution Specialists

How Big Of A Market Is Tax Resolution?

Table 16. Delinquent Collection Activities, Fiscal Years 2017 and 2018

[Money amounts are in thousands of dollars]

Activity	2017	2018
Returns filed with additional tax due:		
Gross total yield from unpaid assessments [1]	54,378,716	55,502,635
Less: Credit transfers [2]	14,395,007	14,895,892
Equals: Net total amount collected	39,983,710	40,606,743
Taxpayer delinquent accounts (thousands):		
Number in beginning inventory	14,005	14,080
Number of new accounts	8,266	7,802
Number of accounts closed	8,191	8,696
Ending inventory:		
Number	14,080	13,186
Balance of assessed tax, penalties, and interest [3]	131,117,253	128,177,486

According To The IRS Data Book In 2018, There Is **\$128,177,486,000**
Owed In Income Taxes Across The Country!!!



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**You NEED To Offer Tax Resolution In
Your Office...PERIOD!!!**



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So You Have **THREE (3)** Ways To Do It...

- 1. TRY To Do It Yourself...On Your Own**
 - a) Most Do Not Charge Enough For The Time It Takes
 - b) Most Do Not Have The Expertise To TRULY Help The Client Properly
 - c) Some Will Hire More Staff To Help And Lose Money Due To Extra Overhead

- 2. Refer It Out To A LOCAL CPA, Attorney Or Enrolled Agent**
 - a) Most End Up With Upset Clients Because That Person Over-Promised

- 3. Partner With Whitewood Solutions And Gain New Loyal Clients**
 - a) We Have Been Helping Tax Professionals Since 2011



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Who Is Whitewood Solutions?

Whitewood Solutions Specializes In Tax Resolution And Has Been Helping Tax Professionals And Their Clients Since 2011...

Those Tax Professionals Who Have Partnered With Us Have Gained New Loyal Clients And Additional “NET” Profit...



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So...What Do We Actually Offer?

Whitewood Tax Solutions offers a way to add a profit-center to your existing business where you earn additional revenue without doing the actual work...we do it for you!!!



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OK...But How?

By Providing Business Owners With Two (2) Different Programs That Allow Them To Offer Tax Resolution Services Without The Hassle Of Learning The This Extremely Specialized Industry!!!



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What Are Our Two (2) Different Programs???



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REFERRAL
PROGRAM

BOSS
Back Office Support Service



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**Our Referral Program Allows You To
Earn 10% Of All Case Fees Collected...
Or \$200...Whichever Is Greater!!!**



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At This Point, Most People Want To Know...

What Is The AVERAGE Case Fee For A Tax Resolution Client???

The Average Case Fee In 2019 Is \$3750

And The Highest Case Enrolled For 2019 Is \$25,000



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What Is The Process To Refer A Client?

- Go to www.YourTaxHelpTeam.com
- Click Refer-A-Client In Upper Right-Hand Corner
- Click Accept and Enter Your Name
- Enter The Client Information Where Indicated
- Have The Client SIGN...NOT TYPE Their Name
- Click Submit To Transmit To Our System
- Advise Your Client We Will Be Calling In 7-10 Days
- You Earn \$200 -OR- 10% Of All Fees Collected
- You Gain Long-Term And Loyal Clients



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**Our No-Cost Referral Program Has Been
Helping Tax Professionals And Business
Owners Just Like YOU...Since 2011!!!**

It Is A PROVEN Model...That Works!!!



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ANY QUESTIONS ON THE REFERRAL PROGRAM?

Then Let's Talk About Our **NEWEST** Program...



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Our NEW 3-Step Program Is Called The...

BOSS
Back Office Support Service

Program



This New Program Allows You More Control Of...

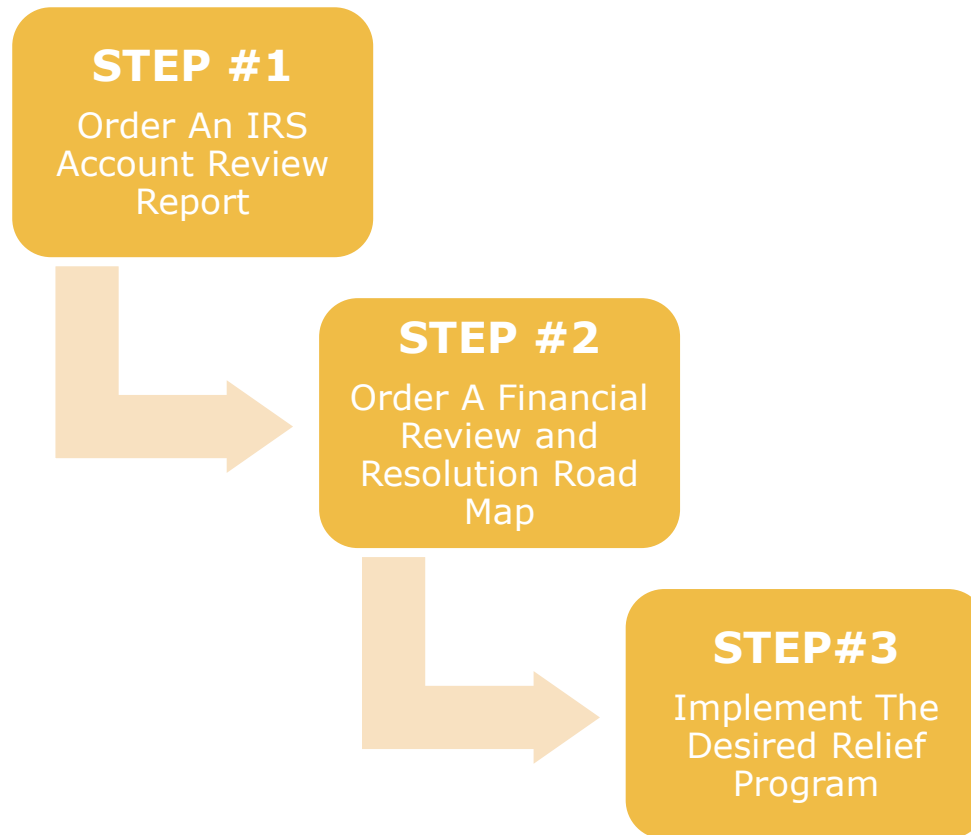
- **Your Clients Enrollment Experience**
- **Your Office's Year-Round Cash Flow**
- **Your Ability To GROW FAST!!!**



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How Does Our “3-Step **BOSS** Program” Work?

Our 3-Step Program Is Easy To Teach And Easy To Implement



**These Next Few Slides Have A LOT Of
Information On Them**

**So I Will NOT Be Reading Word For
Word...But I Will Touch On KEY POINTS**

**Feel Free To Ask Me Any Questions About
These Slides AFTER The Presentation!!!**

STEP #1 - Order An IRS Account Review Report

After You Recognize A Client Who Owes The IRS...You Will Order An IRS Account Review Report Using Their ACTUAL IRS Records, Recommended Fee is \$250

This Report, Which We Call An “ARR” Will Show Your Client The Following:

- All Balances Owed from 2000 through the current tax year
- Any tax liens that have been filed for any tax year
- All penalties assessed and which penalties can be removed under IRS statute
- Any missing returns or returns that are under an IRS exam/audit
- All income transcripts from the prior 6 years which include 1099's, 1098's and more...
- All return transcripts from the last 3 years
- All payments made, withholdings, refunds, levy payments and more...

Turnaround Time For This Step Is 10-15 Business Days



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How Do You Make Money On STEP #1?

This service provides a tangible product that your client will walk away with in their hands. **We suggest charging \$250 for this “ARR”** which includes pulling all of their IRS records.

In order to get this report for your client, you must pay Whitewood \$100 so you will **“NET” \$150 in “Step #1”**.



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STEP #2 - Order A Resolution Road-Map

Once you have given the client their “ARR”, you advise them that the next step is to conduct a thorough “Financial Review”.

After the Financial Review, your client will be given a “Resolution Road-Map” which will show the client **EXACTLY** what programs are available for their **SPECIFIC** situation.

This “Resolution Road-Map has a Suggested Fee of \$595 to generate.

This Road-Map, Will Show Your Client The Following:

- Which relief program they will likely qualify for such as an OIC, PPIA or CNC
- Will show them exactly how much they can save by allowing you to help them
- Will show the timeframe involved in each program for which they qualify
- Will outline the fees involved with allowing you to help them resolve their IRS problem

Turnaround Time For This Step Is 10-15 Business Days



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How Do You Make Money On STEP #2?

This is a service that provides a tangible product which your client will walk away with in their hands so we suggest charging \$595 for this “Resolution Road-Map” which again is much less than other “Tax Resolution Firms” will charge to even pull your IRS records.

In order to get this “Resolution Road-Map” for your client, you must pay Whitewood \$295 so you will “NET” \$300 in “Step #2”



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STEP #3 - Implement The Chosen Relief Program From The “Resolution Road-Map”

Once you have given the client their “Resolution Road-Map”, you will explain the 2-3 programs for which they qualify for based on the outcome of their financial review.

Remember, the “Resolution Road-Map”, Will Show Your Client What It Costs To Obtain Your Help In Resolving Their IRS Issues So There Is No “Selling” Involved

Your Client Will Simply Pick The Program And The Payment Options From The “Resolution Road-Map” And Hire You To Resolve Their Problems For Good

Fees For Step #3 Will Range From \$995 to \$25,000...BUT YOU control all the fees.



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How Do You Make Money On STEP #3?

Now, Step #3 does not provide a tangible product, but it provides a **SERVICE**, as it is the actual implementation of the relief program chosen.

The fees will vary on a case by case basis **but the fees will be in the “Resolution Road-Map”** so the client knows exactly what the fees are and what payment terms are available.

The **AVERAGE FEE** per client in Tax Resolution is \$3750 so you will charge between \$995 and \$25,000 depending on the service provide, the amount owed and the time it will take Whitewood Solutions to finish the case.

In order to have us implement the desired relief program, you **will have to pay Whitewood Solutions a fee of \$500, \$1500 or \$2500** depending on the case.

REMEMBER, at this point, the client has paid \$890 in fees and you have already earned \$450



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Let's Talk Case Fees For A Minute...

The minimum fee for a case is \$995 and the largest case fee we have had in 2019 was \$25,000 so I will use these figures to show you your “profit potential” with this program.

Case Example #1- Minimum Fee Case - You Will NET \$945 And We Do The Work

Client owes \$10,000 to IRS and you want to be nice and charge the minimum fee...

- In Step #1 you made \$150
 - In Step #2 you made \$300
 - In Step #3 you made \$495

Still Talking Case Fees...

Case Example #2- Average Fee Case - You Will NET \$2450 And We Do The Work

EX: Client owes \$45,000 to IRS and Road-Map suggest a case fee of \$3500...

- In Step #1 you made \$150...PLUS they were missing three tax returns, so you charge them SEPARATELY for the missing returns
 - In Step #2 you made \$300
 - In Step #3 you made \$2000

Still Talking Case Fees...

Let's See What A LARGE Case Fee Looks Like

Case Example #3- LARGE Fee Case - You Will NET \$7950 And We Do The Work

EX: Client owes \$275,000 to IRS and Road-Map suggests a case fee of \$10,000...

- In Step #1 you made \$150
 - In Step #2 you made \$300
 - In Step #3 you made \$7000



ANY QUESTIONS?



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**OK...Then Who Is Ready To Add A
“Tax Resolution Profit Center”
To Their Office TODAY?**



How Do You Get Started?

- We have a **monthly participation fee of \$99 per month** (\$995 if paid in one payment)
- Any other fees **are only paid when you have clients to help** as we discussed

What Does The “Set-Up” Fee Include?

- Enrollment / Set-Up Of Your Office(s) Into Our System
- 60 Minutes Of Phone Assistance (additional phone support is billed @ \$50/hour)
- Unlimited Email Assistance And Questions Answered
- A Digital Flyer Template To Help You Market Your New Service



Whitewood Solutions' Case Fees Charged To You By Amount Owed:

- Under \$20,000 - We Charge You \$500
- \$20,001 to \$99,000 - We Charge You \$1000
- \$99,001 and Over - We Charge You \$2500



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