



TAX RESOLUTION REFERRAL STEP-BY-STEP GUIDE

1. Ask **EVERY** Client If They Have Any IRS Problems We Can Review At **NO COST**
2. Explain That Whitewood Solutions Is **YOUR TAX HELP PARTNER**
3. Explain That This Initial **DUE DILIGENCE** Step Is **FREE**
4. Let Them Know They Will Receive A **FREE** IRS Account Review Report In 5-7 Days
5. Have The Client Sit Down And Go To www.YourTaxHelpTeam.com
 - a. Click Refer-A-Client On The Home Page
 - b. Click **ACCEPT** On The Terms Box
 - c. Enter **YOUR** Name On The Box Asking For Name Initially
 - d. **COMPLETE** The Intake Forms By Asking The **CLIENT** Questions Listed
 - e. Have The Client **DRAW** Their Signature On Computer
 - f. Click **SUBMIT** Once It Lights Up Green
6. **THANK** The Client And Remind Them **WHITEWOOD** Will Be Calling In 5-7 Days

Whitewood Solutions Contact Information

Phone: 1-800-371-1439 Email: info@whitewoodsolutions.com FAX: 1-888-391-5122

REFERRAL

PROGRAM



REMEMBER:

Send **ALL** Clients To **Whitewood Solutions** For The Following:

- Help With An IRS Wage Or Bank **LEVY**
- Help With An IRS Tax **LIEN**
- Any **PAST-DUE** IRS Balances
- Any **IRS Notices** Pertaining To Audits Or Money Due
- Any Client On An IRS Installment Agreement **Who Owes Again**
- Any Client With A **PROFIT On A SCHEDULE C** Over \$12K
- Any **EITC Audit** Or Dispute Notice
- Any **Tax Problem** That Requires A Call To IRS

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