



CommunityTax

a **nextpoint** company

Referral Partner - Frequently Asked Questions

What is the minimum amount in tax balances you work with?

While we always ensure financial benefit when it comes to our fees, the general rule of thumb is that the most value is given with clients that owe at least \$7,000+ in tax debt. The \$7,000+ can be a combination of years or a single year

Who is a target client?

1) Tax returns you have prepared that have balances. (Keep in mind, the one return you prepared might have a small balance, but they could have past balances). Simply asking "Do you have any additional balances"? could help you identify potential customers.

Once you have identified the balances.

2) Try to uncover whether they have the means to pay it back in full or in 4 months (there is a fine line between not wanting to pay it back and not being able to afford too). Our value increases when the likelihood of them being able to pay it in full or in 4 months decreases. Remember, we can still help if they don't want to liquidate assets or drain savings accounts to pay it all back right away.

3) You might have clients who come to you with threatening notices, local IRS agents, or are facing enforced collection action like wage garnishments/bank seizures. We can explain the notices, work with local agents and obtain garnishment releases.

4) They've tried to fix this in the past on their own and got nowhere. It can be a tedious process to resolve complete tax problems with the IRS.

5) Your client cannot continue to owe year over year. Part of our program identifies the real tax issue, and we work with the client extensively in order to adapt to a new lifestyle that includes making withholding adjustments and estimated tax payments. We prefer to avoid repeat clients.

6) They might feel intimidated working with the IRS. Remember, we are fully bilingual, and we will take over and handle all communication and correspondence with the IRS once they move into the resolution phase. Taxpayers have the right to retain representation!

7) They are undocumented and face tax problems but are worried about getting the process started due to deportation fears. Remember the IRS and Immigration and Customs Enforcement are separate and fixing their tax problems is essential on the path to documentation/citizenship.

8) If your client has been rejected for an Easy Advance or tells you the IRS keeps my refund every year. Chances are, they have back tax liabilities.

9) **Note. Community Tax does not offer services related to stimulus payments or refund updates.**

How does your program work once I refer?

Each client is contracted for the tax investigation for a nominal fee. After that, the Investigation determines what program or programs your client qualifies for based on their financial situation and they will then be presented with a flat cost to resolve their tax liability. It is then the client's decision whether or not to move forward to resolve their tax problems. In our experience, approximately 80% of all clients will elect to move forward to resolution. One of our guiding missions is to offer affordability and accessibility, and there are discounts and payment plans available, so we don't have to turn away clients due to an inability to pay for our services.

Do you offer any guarantee?

We offer a money back "Service Guarantee", which states, once the Investigation is complete if we cannot offer any services, we will refund your Investigation fee. Note – this is not to be confused with a satisfaction guarantee.

When does Community Tax first reach out?

As soon as you submit your client's information using the referral portal. Our technology allows us to contact a customer usually within minutes during business hours.

Do you help my clients with back State taxes?

We work specifically with state balances from California and New York exclusively at this time. States are often hard to reach and uncooperative, and our goal is to offer a service we can always stand by.

What states is this program available in?

We operate in 50 states with the exception being Minnesota and North Dakota.

How long does the tax resolution process take on average?

We have a two phased approach. The first phase or Tax Investigation will take on average 10-14 days. The resolution portion can vary and it is dependent upon which program(s) the client qualifies for. Some agreements can be set in place in as little as 7-10 days and some can take up to 18 months, such as the Offer in Compromise. We'll set the proper expectations with the client once we complete the Tax Investigation and have a better understanding of what program we are targeting for their resolution.

What are the different programs and what's the qualification process?

The programs and guidelines to qualify are based on a business' or individual's income, assets and expenses. The programs range from negotiated payment plans to settlements. The sole purpose of the Tax Investigation is to explore all programs and prequalify the client or business for the best possible and most affordable outcome, while taking their personal financial goals into account.

What is the “Fresh Start Program” and “People’s First Initiative”?

These were adjustments to the IRS’ internal guidelines to add flexibility to the qualifications for their programs, speed up the approval processing times, and encourage taxpayers to resolve their tax matters.

Can’t I just do it myself?

Non-credentialed individuals have limited representation rights and can generally only represent clients whose return they prepared and signed. Limited representation rights also means that even though they may have prepared the return, they cannot represent clients regarding appeals or collection issues. EA’s, Tax Attorneys and CPA’s enjoy unlimited representation rights and may represent clients on any tax matters. This is what we do for thousands of clients every month. And at the same time, your time is valuable. By referring a client, you save hours that can be spent preparing returns for other customers or focusing on how to grow your customer base.

Do you have suggestions on how to present this to a potential client once I’ve determined they qualify for help?

*We believe the easiest way to present this to a client is something along the lines of, “**We’ve partnered with one of the nation’s largest and most established tax resolution company. They have made it easy to explain if and how they can help you because they offer a no cost, no obligation consultation**”.*

We believe simply telling your clients there is professional, experienced and affordable help with Community Tax, “**Talk to them, they’ll explain your options**”.

If you can simply refer them, our courteous and knowledgeable enrollment team will do the rest. We will work to create urgency and build value behind our services.

I already referred a client; how can I see what’s going on?

The referral partner portal will allow you to track the status of new and active referrals.