The Perfect Tax Resolution Admin

Presented by Parham Khorsandi, Esq.

When do you need to hire?

a. ABH – Always Be Hiring
b. Hiring when you need someone is too late!
c. You hire in anticipation of needing someone
d. Hiring out of desperation leads to bad candidates and bad hires

How to find the right candidate:

a. Hire slow, fire fast
b. Ask your current employees
    i. Shows you care about their opinion
    ii. Gets them to talk about where they work (hopefully good things)
    iii. Can offer incentives

Admin / Paralegal / Case Specialist

a. Nowadays, people wear multiple hats, and their title is shifting
b. You should manage your employee's expectations of what is considered part of the job description
c. A good employee will do what you ask within reason

Duties for a Tax Resolution employee:

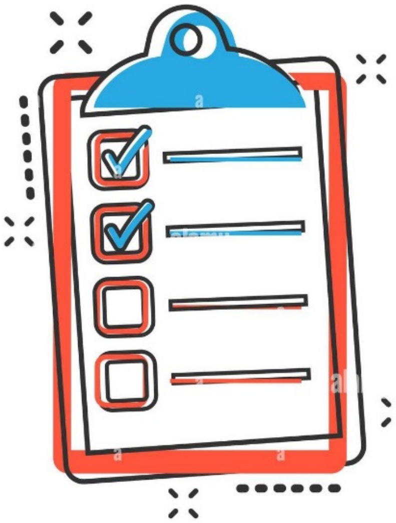
a. Follow up with Leads
b. Draft Engagement Documents
c. IRS Compliance Checks (Form 8821)
d. Get Transcripts (Form 8821) or SOR
e. *Document gathering and client follow-up
f. *433 Financial Preparation

Follow up with Leads

a. Understand the base rate of your lead pool
b. Unorganized procrastinators
c. Takes a long time to make a decision. They have tax problems for YEARS before talking to you
d. Someone needs to follow up after the consultation
e. Schedule and aggressiveness is based on you
f. You already paid for the lead so make every attempt to reach the lead and close

Drafting Engagement Documents

a. Contract/Engagement Letter
b. Powers of Attorney: IRS and State
c. Payment information to your office
d. Once received, what should this person do with the signed documents?



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IRS Compliance Checks

a. Your business should have its own CAF # to put on the 8821
b. Staff can call PPS and do a Compliance Check and get information
c. You may still need to call with a 2848 to get HOLD TIME / COLLECTION HOLD

Get Transcripts (Form 8821) or SOR

a. With an 8821, your staff can also get Transcripts from the IRS
b. Account Transcripts, Wage and Income etc.
c. Staff will need their own SOR Mailbox: Secure Object Repository
    i. This is how PPS sends the transcripts to your staff
    ii. Each staff needs their own SOR
    iii. DO NOT need to be licensed to have an SOR

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Document Gathering and Client Follow up

a. AFTER they are trained
b. Clients will likely ask questions and they should be able to answer them
c. Can set tasks for themselves until they have obtained the necessary documents
d. You should not be doing your own follow up (very hard to delegate)

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433 Financial Prep

a. AFTER they are trained
b. Can put together packages for RO, ACS, OIC etc.
c. Always review financial packages before they are sent out

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10-Day Letter / Revokes

a. Issue 10-day letters to non-responsive clients

…If after 10 days no contact is made revoke Power of Attorney