

TRI VIP Program™

Ultimate Level Benefits

Whether you practice tax resolution full-time or just come across it when your traditional tax clients have issues, you cannot go wrong with having a “back office” that provides you with 30-plus years of experience. For a ridiculously low cost, have all the resources you need just one call, or click away.

1. Live consultation time included

3-hours consultation time (2-hours if paying monthly).

*Nothing is more reassuring than having the answers you need, right when you need them. This can easily be accomplished with TRI's **VIP Program™** consultation time with a CPA or tax attorney.*

2. One low price gives you unlimited access (save \$100 on the annual payment)

With this level of access, you have unlimited access to webinars, eLearning courses, comprehensive knowledge base, forms and much more.

Not sure which items you need? No problem. You have access to the full spectrum of courses and more. At such a low annual price, you cannot afford to pass this up.

3. 500+ page tax resolution textbook included (with annual payment)

Both hardcover and pdf versions included.

Whether you like holding a book in your hand or accessing it digitally, you will gain access to our comprehensive textbook covering all major areas of tax resolution.

4. Discounts on live events and other items (save 20 - 40%)

With the annual payment, you never pay full-price.

*If you are part of the Ultimate Level in TRI's **VIP Program™**, you save a least 20% sitewide. If you want to take things to the next level, you save 40% off TRI's **Professional's System**.*

5. Support for non-resolution items (with annual payment)

Have a traditional tax, sales or marketing question? We're here to help...

As part of your consultation time, you can ask us anything related to tax, sales and marketing. This ensures you have all the support you need to make your business a success.

For more information visit www.taxresolutioninstitute.org/sign-up

Ultimate Annual

Here is what you will receive with the Ultimate Annual Membership

3 Hours of Consultation Time

Do you have a complex case and need some help? Are you spending too much time researching a solution? Let us be your back office. You will have access to Consultation Time with a CPA or tax attorney regarding ANY tax, sales or marketing matter.

Time is broken into 15 minute blocks. 3 hours available immediately.

Access to Webinars on Demand

Have you ever taken a course and wanted to watch all or part of it again? Maybe you heard a “juicy” bit of information and wanted to rewind so you can write it down this time. All TRI webinars are available at your fingertips anytime and each new course will be available one week after its live broadcast.

Please note: These courses are not eligible for CPE/MCLE in this format.

Live Tax Resolution Training Webinars

Every month you will have access to our Course of the Month on worth a minimum of 1 hour of CPE/MCLE.

Access to our Knowledge Base

Stop searching all over the internet for answers to your basic Tax Resolution Questions. Chances are someone has already asked us, and we have compiled those answers in one quick, easy, and convenient format.

The Ultimate Guide to Tax Resolution Textbook

Our founder Peter Y. Stephan literally wrote the book on the subject of

Tax Resolution...And you get a copy for Free! The Hardcover book will be mailed to you along with your welcome packet.

Access to eLearning on Demand

All eLearning courses are eligible for CPE/MCLE and can be completed at anytime, anywhere. Midnight? No problem. Riding the bus? No problem. As long as you have an internet connection, you can take these courses.

Access to our IRS Forms Library

Have you ever had trouble finding the right forms on the IRS website? Well look no further. We have compiled all the most up-to-date forms you need into one convenient location.

20% Discount on All TRI Products

Extreme Discount on The Ultimate Professionals System

Take an extra 40% off your purchase of The Ultimate Professionals System on top of the 20% you will already be receiving.

Practitioner's Forum Recordings Archive

Members have access to our archive of previously broadcast Practitioner's Forums and are encouraged to participate in upcoming calls.

Price: \$980/yr.

Sign Up Here

Ultimate Monthly

Here is what you will receive with the Ultimate Monthly Membership

2 Hours of Consultation Time

Do you have a complex case and need some help? Are you spending too much time researching a solution? Let us be your back office. You will have access to consultation time with a CPA or tax attorney regarding ANY tax, sales or marketing matter.

Time is broken into 15 minute blocks. The 1st hour is available immediately and the 2nd hour is available after 91 days of membership.

Access to Webinars on Demand

Have you ever taken a course and wanted to watch all or part of it again? Maybe you heard a “juicy” bit of information and wanted to rewind so you can write it down this time. All TRI webinars are available at your fingertips anytime and each new course will be available one week after its live broadcast.

Please note: These courses are not eligible for CPE/MCLE in this format.

Live Tax Resolution Training Webinars

Every month you will have access to our Course of the Month worth a minimum of 1 hour of CPE/MCLE.

Access to our Knowledge Base

Stop searching all over the internet for answers to your basic Tax Resolution Questions. Chances are someone has already asked us, and we have compiled those answers in one quick, easy, and convenient format.

Access to eLearning on Demand

All eLearning courses are eligible for CPE/MCLE and can be completed at

anytime, anywhere. Midnight? No problem. Riding the bus? No problem. As long as you have an internet connection, you can take these courses.

Access to our IRS Forms Library

Have you ever had trouble finding the right forms on the IRS website? Well look no further. We have compiled all the most up-to-date forms you need into one convenient location.

15% Discount on All TRI Products

Extreme Discount on The Ultimate Professionals System

Take an extra 15% off your purchase of The Ultimate Professionals System on top of the 15% you will already be receiving.

Practitioner's Forum Recordings Archive

Members have access to our archive of previously broadcast Practitioner's Forums and are encouraged to participate in upcoming calls.

Price:

\$270 Sign Up Fee

(Covers first 3 months of membership)

\$90/mo. After 3rd month

Sign Up Here

Tax Resolution

4 Tricks to Help Your Tax Clients

Whether you realize it or not, if you practice in the area of tax you have clients with tax problems. Learn how to best serve your tax clients and bill for your knowledge, not time.

1. Streamlined installment agreements – Part 1 (no lien filed)

Your client owes \$50,000 or less and can full-pay over 72 months.

If your client owes the IRS \$50,000 or less, the IRS not only allows taxpayers to pay over 6 years, the taxpayer can also request that a lien not be filed if they owe \$25,000 or less. This way your client can protect their credit and keep their financial picture clean.

2. Streamlined installment agreements – Part 2 (up to \$100,000)

Your client owes \$50,000 - \$100,000 and can full-pay over 84 months

The IRS is testing a new installment agreement program in which they raised both the amount your client can owe and the time in which to pay. If your client qualifies for this program, you can solve a major issue with relatively little work.

3. Trust Fund Recovery penalty defense (read on to learn about Status 63)

The IRS wants to meet with your client to determine if they are personally “responsible” for unpaid payroll taxes.

*In this meeting (referred to as a 4180 interview), it is possible to (1) keep your client from being personally assessed, (2) get your client’s company into an installment agreement, and (3) if your client is found responsible, you can request that the IRS forego assessing them personally (**Status 63**). This not only prevents forced collection activity, but it can keep their credit history clean.*

4. Wage and bank levy release (get your client’s money back!):

Your client contacts you in a panic because their bank account was levied or their wages were garnished.

To resolve this type of issue the “regular” way, you either need to (1) have your client pay what they owe, or (2) show that due to hardship, they need to make payments based on ability to pay (note that neither option above addresses the short-term issue with regard to the frozen funds).

It is possible to have a levy either fully or partially released if you can prove that your client needs the funds in question to pay for a necessary living expense (i.e. rent, mortgage, car payment etc.).

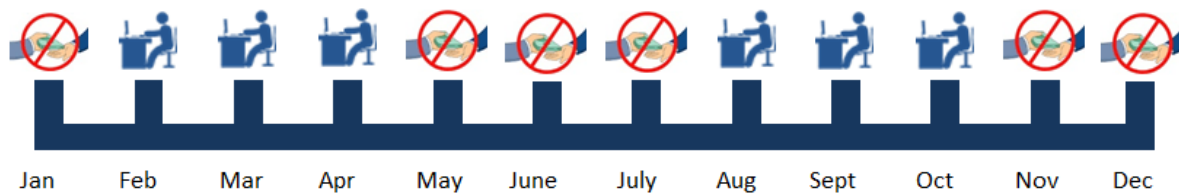
Stay Busy All Year Long

Learn How Tax Resolution Can Keep Income Flowing Year Round

Tax Resolution, also known as Tax Controversy, is a specialized area of practice which helps taxpayers negotiate with the IRS or State to resolve their delinquent tax debt(s).

Stop Selling a Commodity

A traditional tax practice is lucky to be busy 6 months of the year. Traditional tax practitioners are selling, in general, an indistinguishable commodity. Until a taxpayer has a bad experience and realizes *why* some accountants charge more than others, they will always shop around for the best “deal” when looking for regular tax and accounting services.



There is No Season for Tax Resolution

Expand Your Client Offerings

Distinguish yourself from the typical tax guys with value added services. Be the COMPLETE expert your clients need and stop turning away clients with collection issues because you think these cases are too hard to handle or because you don't

have time. We will show you how anyone has the time when you consider the reward. Be a hero to your clients when you get a levy released, have a wage garnishment stopped, and stop the threatening letters from the IRS and State that your clients dread to receive. Help them sleep better at night and they will stick with you forever.

IRS Collection Activity is Constantly Occurring

[In fiscal year 2016, the IRS assessed over **39.5 million** civil penalties amounting to over **27.3 billion dollars owed**.](#) Of the penalties assessed, 5.2 million penalties were abated amounting to almost 9 billion dollars in savings to delinquent taxpayers.

In fiscal year 2015 alone,

- 515,247 Federal Tax Liens were filed.
- 1,464,026 3rd Party levies were requested.
- 426 accounts had assets seized.

Delinquent Taxpayers are in need of specialized help all over the country. Why turn down clients with collection issues when...

It is Getting Even Easier to Solve IRS Tax Collection Issues

Coinciding with lowered requirements to qualify for an Offer in Compromise, record levels of Offers in Compromise have been accepted in recent years. In 2016, 63,000 offers were submitted to the IRS. 27,000 (43%) of those Offers were accepted, amounting to almost \$226 Million.

[The IRS has also relaxed installment agreement rules for another year](#), decreasing the amount of information required to be submitted for lower liabilities.

The Tax Resolution Institute has a 95% Offer in Compromise acceptance rate. We are extremely familiar with the intricacies that make the difference between an offer being accepted or rejected.

Bill for Knowledge, Not Time

Tax Resolution is a service which commands a premium price because few know how to do it properly.

Work is not generally done at an hourly rate, but on a flexible fixed fee in the form of a retainer.

The average industry price for preparing a streamlined installment agreement ranges from \$1,500 to \$2,500. If you are well versed in this type of work, you can complete the job in a few hours. This makes your ***effective billable rate \$500 or more***. Not too shabby.

The average industry rate for preparing and submitting an Offer in Compromise ranges from \$5,000 – \$15,000 depending on the scope of the delinquency (*not the amount owed*). Clients with well-organized documentation will take less time than clients that bring you receipts in a shoebox, and your fee should reflect that.

Many Tax Resolution Clients are Repeat Offenders

The three most common professionals with tax collection issues are real estate brokers, attorneys, and self-employed (Schedule "C") taxpayers. These types of

businesses earn money sporadically and are not always ready to pay their estimate tax payments.

It starts small. Maybe missing an estimated tax payment. The taxpayers tell themselves “I will make up for it on the next payment”, thinking that the “the big one is just around the corner.” But many don’t and eventually the IRS catches up.

When people face the threat of the IRS or even worse, they are happy to pay someone to handle their unfiled returns and negotiate an installment agreement or offer in compromise.

To top it off, you can often get more business because, in a few years, they come back having put themselves in the same situation. Be sure to put resolution client files in the back of the cabinet as opposed to throwing them away, because you will be pulling them out again.

Sign up for a TRI Membership and get all the resources you need to become a successful tax resolution specialist.

[LEARN MORE](#)