Onboarding

TAX RESOLUTION CLIENT CHECK LIST

- [ ] **COMPLETE AN INITIAL DISCOVERY CALL WITH CLIENT.**

  - ASK QUESTIONS TO UNDERSTAND THE CLIENT'S SITUATION BETTER (CLIENT QUESTIONNAIRE). TRY TO GET TO KNOW YOUR CLIENT THE BEST YOU CAN.

  - EXPLAIN TO THE CLIENT THE TAX PROBLEM ANALYSIS FEE & HOW IT WILL BE BILLED.

- [ ] **SEND CLIENT TAX PROBLEM ANALYSIS EMAIL, FORM 8821, & $575 INVOICE.**

- [ ] **COMPLETE COMPLIANCE CHECK WITH THE IRS WITHIN 7 DAYS OF RECEIVING PAYMENT.**

- [ ] **ANALYZE ALL INFORMATION & TRANSCRIPTS RECEIVED FROM THE INTERNAL REVENUE SERVICE TO DETERMINE THE BEST ROUTE TO TAKE FOR THE CLIENT.**

- [ ] **PROVIDE THE CLIENT WITH A STEP-BY-STEP GAME PLAN TO RESOLVE THEIR ISSUES WITH THE INTERNAL REVENUE SERVICE.**

- [ ] **SEND THE CLIENT CASE REVIEW AND SET UP ON MONTHLY PAYMENT.**