



PRESENTS

A background image showing a person's hands working at a desk. One hand is using a green pencil to point at a document with charts and graphs. The other hand is using a calculator. A keyboard is visible in the foreground. A purple banner is overlaid on the right side of the image.

# **TAXBIZ**

COURSE SYLLABUS

## A LIFE YOU ABSOLUTELY LOVE



**Hey, Ben Robinson here.**

In this document, you're going to discover what's waiting for you inside of your TaxBiz education center.

TaxBiz is made up of 4 main sections, each focusing on the 3 key areas of learning: Skills, Clients, and Systems.

**SECTION #1 - 21ST CENTURY TAX PREPARATION SKILLS** is all about becoming a high quality tax professional.

**SECTION #2 - 21ST CENTURY CLIENTS** is where you'll get your first handful of clients to get your business off the ground as well as perfect your marketing to grow your business efficiently.

**SECTION #3 - 21ST CENTURY BUSINESS RESOURCES** is where you'll develop the systems you'll need to succeed (and run your business day-to-day.)

**SECTION #4 - CONTINUING EDUCATION** is perfect for when you're ready to expand your knowledge and distinguish yourself as a qualified professional.

**Let's dive into the specifics of each Section...**



## Overview

The first thing that we're going to cover is skills.

What we want to do here is give you those basic skills so that you understand the law, the regulation, and the code level, regardless of what type of tax return it is that you're preparing.

Then we move into the specifics of the business forms and schedules that you will need to prepare and file for your clients.

## What You'll Learn

- The 21st Century Tax Preparation Skills you need to wow your clients
- How to clearly understand the role of a 21st Century Tax Professional in the modern business landscape
- Everything you need to know about the 4 most important tax forms and their accompanying schedules: Form 1065, Form 1120S, Form 1120, and Form 1040
- How to gather information and deliver beautiful returns that will blow the competition away
- How to give your client hope for a better financial future
- My proven system for walking a client from consultation to filed return and beyond in a way that leaves them relieved and amazed at the stress-free experience

# SECTION #1 - 21ST CENTURY TAX PREPARATION SKILLS



## Foundations

- Compliance
- Basics
- Tax Flow



## Form 1065 - Partnerships

- 1065 Skills
- 1065 Exercise
- 1065 Demo



## Form 1040 - Individuals

- 1040 Skills
- 1040 Exercise
- 1040 Demo



## Research

- Tax Research Project



## Form 1120 - C Corporations

- 1120 Skills
- 1120 Exercise
- 1120 Demo



## Estimate

- Estimated Taxes for Individuals
- Estimated Taxes for Corporations



## Form 1120S - S Corporations

- 1120S Skills
- 1120S Exercise
- 1120S Demo



## Advise

- Advising your Client





### Overview

Now we move over to clients because great skills without clients isn't a business, it's a hobby.

So we want to make sure that you go out there and get clients... and get them in the most effective, proven ways. That's what 21st Century Clients is all about; the best way to get those first handful of clients and then how to take it to the next level.

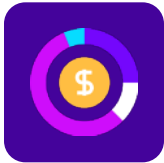
### What You'll Learn

- The difference between busy vs breakthrough marketing work (and why you need to spend as much time as possible doing breakthrough work!)
- How to define your "ideal target market" in a way that sets you up for short-term and long-term success
- How to get inside your prospective client's head and understand what they're REALLY looking for
- The #1 mistake people make with their business card (this costs them lots of clients)
- The 3 stages of professional relationships...and how to quickly progress through them seamlessly
- Word for word scripts to use at a networking conference so you come across as professional, likeable and non-salesy!
- The secrets to coming across as confident in a professional setting (even if you feel terrified inside)
- How to craft a marketing and sales message that will make prospective clients EAGER to work with you
- The BEST place for you to find new, high-quality clients who will line up to hire you



### Leader U

- Crash Course
- Take Leadership Action



### Money U

- Get Ready to Earn
- Take Money Action



### Yakkity-Yak

- How to Yakkity-Yak
- You Can Do It!



### Traditional Networking

- How to Network
- Mix & Mingle



### Online Networking

- How to Network Online
- Connect & Converse



### Email Outreach

- Using Email Outreach
- Implementation



### Irresistible Selling Statement

- ISS Introduction
- Creating Your ISS



### Niche Power

- Riches in the Niches



### Referral Partners

- Why Referral Partners Matter
- Effective Referral Partner Marketing



### Setup 7

- Get Started
- Make It Official



### Website & Social Media Marketing

- Website & Social Media Introduction
- Your Website Challenge
- Social Media Marketing



### Overview

Next is business resources.

Remember, systems = sanity. Systems ensure that you get the job done as quickly and efficiently as possible. We want to make sure that you're doing the right things, which is effectiveness, and we want to make sure you're doing those right things efficiently.

As part of your business systems, you need templates, checklists, and tools. We created a library of proven, practical resources so that you can set your business up for success from the very beginning.

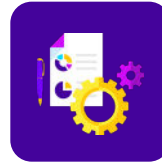
### What You'll Learn

- How to set up and manage your business in order to create your 3F Lifestyle
- Our proven checklists and templates to make you confident that you're ready to hit the "GO!" button with your business
- Email templates and script tools so all of your communication is like a pro from the start
- Tax policy templates to make sure you don't miss a thing
- Our one-of-a-kind pricing calculator to get you the high dollar compensation you deserve
- Our proven toolkit that walks you through creating a brand for your digital tax business
- The best tools successful tax preparers are currently using in order to save you time when building your tech stack
- Prior year tax form nuances in case you have any clients with historical returns to file or amend



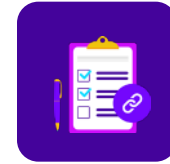
### Checklists & Documents

- Checklists
- Templates
- Policies
- Brand Creation Toolkit
- Pricing Calculator



### Tools & Technology

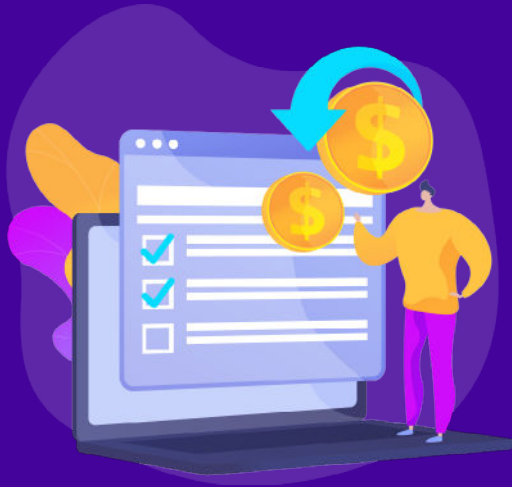
- What We Recommend
- Tax Software
- Additional Apps
- Security & Data Backup
- Office Solutions



### Prior Years

- Form 1065
- Form 1120S
- Form 1120
- Form 1040





### Overview

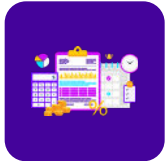
As an authorized CE provider through the IRS, we provide the credits you need to become or maintain your tax preparer designation.

As a credentialed or non-credentialed tax preparer, you can participate in this program and provide more value to your clients and be able to sell yourself a bit more.

You not only can learn the skills and basics needed to serve your clients successfully, but you can further distinguish yourself as an expert by participating in the Annual Filing Season Program.

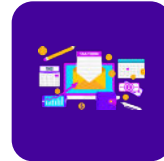
### What You'll Learn

- Current rules and regulations for credentialed and non-credentialed tax preparers to stay up-to-date with exactly what you need to know
- How to become a registered tax preparer so that you can further distinguish yourself as a 21st Century Tax Professional
- The benefits and limitations of being a registered tax preparer and how it increases the value you provide for your clients
- Circular 230 ethical standards to make sure you can run your business with the highest level of professionalism
- Business and individual tax basics so that you don't have to be in the dark when filing your clients' returns
- Tax planning for small business owners because no one likes to be surprised by a big tax bill
- What you need to know about reporting foreign assets, foreign income, and foreign accounts
- How to calculate estimated taxes for individuals to eliminate your clients' estimated tax penalties



### Annual Federal Tax Refresher

- For non-credentialed preparers



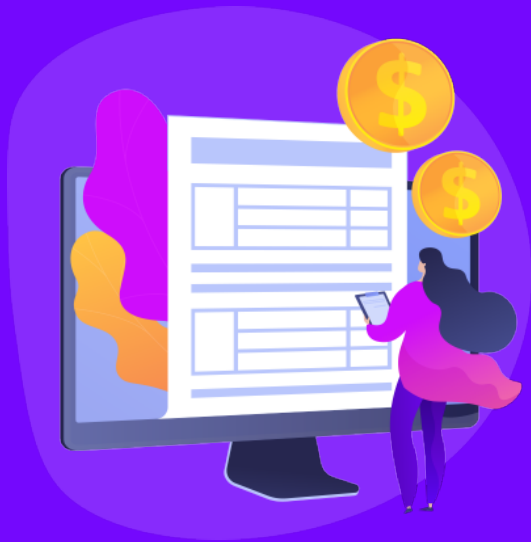
### Federal Tax Law Update

- For credentialed preparers

### CE Courses for All Preparers

- Understand the Basics of Reporting Requirements for Foreign Income, Foreign Accounts, and Foreign Assets
- The Basics of Form 1065 (Partnerships)
- Business Tax Basics
- The Basics of Form 1120S (S-Corporations)
- The Basics of Form 1120 (C-Corporations)
- Circular 230 - Tax Practitioner Ethics
- Form 1040 Structure, Filing Status, & Dependents
- The Basics of Form 1040 Income
- The Basics of Form 1040 Adjustments & Deductions
- The Basics of Form 1040 Credits & Estimated Tax Payments
- Tax Depreciation Basics
- Estimated Tax Basics For Individuals
- Tax Planning Basics For Small Business Owners

**When you are ready to get your business started, simply follow our step-by-step plan to have your business set up in 7 days!**



## What You Get

- My “business launch” plan that will show you how to legally form your business in 1-week FLAT
- Important tax setup information that you don’t want to make a mistake with
- A list of all of the licenses and permits that you’ll need to get (plus, a guide to help you get them all)
- The best way to setup your bank and merchant accounts so you can get paid (plus a handful of crucial mistakes that some people make while setting up their bank accounts!)
- How to onboard a client safely and smoothly

## Hit a Roadblock or Challenge Along The Way?

## The Student Success Team Is Here To Help



When you join TaxBiz, you'll get immediate and direct access to the Student Success Team (SST).

The Student Success Team is there to help and assist you however they can in achieving your goal of becoming a 21st Century Tax Professional.

### UNLIMITED EMAIL SUPPORT

You'll get unlimited access to the team via email for as long as you need. This support is perfect for any questions that come up that you need a detailed or immediate answer to. While our response times can vary, our typical response time is 72 minutes during business hours, and we average a happiness rating of 97% (according to our customer service software reports)!

Whether you have a question on day 1 or 5 years from now, we are here to help you experience success and serve your clients with excellence.

Some of the SST are past students who have become successful tax professionals. Others are seasoned professionals who bring their years of experience to every interaction.

They've been in your shoes. They all started with zero clients. And they know what it takes to build a successful business from the ground up.

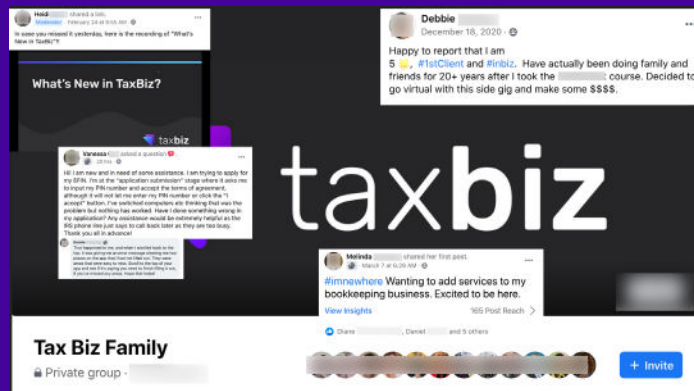
# YOUR TRIBE AT "TAXBIZ FAMILY"



## Overview

Something my students tell me, which I'm very proud of, is that the greatest support group they have access to is our TAXBIZ FAMILY community.

They all point to this group as the "go-to location" to get the help and support they need...



I'm proud to say that one of the BEST resources inside of TaxBiz is the private Facebook community.

This is our VIBRANT community of over 650 students, graduates, and instructors, all full of encouragement, answers, and "been there, done that" wisdom.

Once you join, you'll immediately surround yourself with the best and brightest tax professionals out there.

## What You Get

This is an exclusive community and only available to students of TaxBiz. Inside you'll be able to:

- Discover what's working for other tax professionals, and learn from their failures and successes
- Find encouragement and inspiration
- Get answers to any challenges you have
- Discover new opportunities for your tax business
- Share what's working for you
- Share your successes (we LOVE to celebrate with you when you get your business set up, your first consultation, get your first client, etc.)

Even though the TaxBiz program is a powerful business launching program, the real power for your success is inside this community!

What would it mean to have 24/7 access to a group of supportive peers who are already successful 21st Century Tax Professionals and want to help you succeed?

Imagine having a dedicated group of fellow professionals that you can turn to when you need answers fast...

Imagine a network of trusted colleagues who are at your disposal 24/7...

Now, imagine they're the friendliest and most supportive group of individuals you've ever met...

...all of whom share your passion for achieving a life of freedom, family, and finances!

That's what's waiting for you inside of our active members' community. The greatest community of its kind.



Remember: when you join TaxBiz, you're covered by our unconditional, 30-day money-back guarantee. I want to make this decision as simple as possible for you by removing as much risk as I possibly can.

## **Our IRONCLAD 30-day “No Questions Asked” Money Back Guarantee**

Simply put: when you join us...if you ain't happy, I ain't happy. Whether that's 29 minutes or 29 days after you join...

When you are a part of TaxBiz, I want you to be absolutely thrilled with the program. I therefore guarantee that after your purchase, if you aren't completely satisfied with the program (for any reason whatsoever) you can request a full refund within the 30 day refund period.

If you're not satisfied, simply click the Cancel button within 30 days of purchase, and we'll promptly return every last cent of the investment you made, with no questions asked.

Although we are generally able to respond within a few hours during normal office hours, please allow 1 business day for your refund to be processed and confirmed.