

Susana, we've done the heavy lifting. Your new one-link page is live at bio.retaxconsulting.com, and your **LinkedIn, YouTube, and WhatsApp** are already on the new brand. What's left is mostly your **Instagram + Facebook** and the **old-website redirect**. Here are your three steps, quickest first. (Short on time? Part of step 3 can be handed right back to us, just ask.)

PICK YOUR LAUNCH DATE

Choose a day in the next week or two to make your Instagram + Facebook changes and go public with the new name. Tell us the date and we'll have your announcement post ready to go live that day.

1 Skim the Owner Guide

Open your [Owner Guide](#). It's your "which return, which tier, which deadline" reference, so you can handle any client scenario with confidence.

2 Finish your Plan (EOS)

This is where you set your goals and core values for the year, so give it real, unrushed time. [Open your Operating Plan](#), fill in what's clear, and "park" anything to sit on. We'll shape the plan around whatever you choose, together.

New to EOS? Here's a quick intro from its creator: [What is EOS?](#).

3 Finish the rebrand

The visible part of the switch, and the last piece. Do these in any order.

Instagram

[Profile > Edit profile](#)

Setting	Set it to
Name	Real Estate Tax Consulting
Username	@retaxconsulting (if taken: @retaxco or @realestatetaxconsulting)
Bio (150 char)	"Keep more cash in every real estate deal · Proactive tax strategy for investors · Book a free Discovery Call below" (emoji optional)
Link	bio.retaxconsulting.com
Profile photo	Your new logo (download it in "Brand assets" below)
Account type	Business / Professional · Category: Tax Preparation Service · add email + WhatsApp as contact buttons

Facebook Page

[Edit Page info \(or Settings > Page info\)](#)

Setting	Set it to
Page name	Real Estate Tax Consulting (a name change can take Facebook up to ~3 days to approve)

Setting	Set it to
Username (@handle)	@retaxconsulting, or the closest available
Bio / Description	Same line as your Instagram bio
Website	bio.retaxconsulting.com
Category	Tax Preparation Service / Financial Service
Profile photo	Your new logo (download below)
Cover photo	We've made you one (download below)
Action button	Book now > discovery.retaxconsulting.com/book

Your brand assets (tap to download)



Profile photo
square, IG + FB
[Download](#)



Facebook cover
[Download](#)

QuickBooks

Account & Settings > Company

Setting	Set it to
Company name	Real Estate Tax Consulting
Legal name	Taxes on Wheels, LLC (leave unchanged)

Invoice logo: the name change above updates the name on invoices; the logo is a separate upload.

QuickBooks > Custom form styles > upload your new logo.

Email signature

Your CRM and Gmail signatures are already on the new brand. If you also send from Outlook, paste this block there (you can set it per "From" address, so it's right whichever you send from):

Susana Cruz
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e susana@retaxconsulting.com
w retaxconsulting.com
Book a call: bio.retaxconsulting.com

Old website (onwheels.tax)

Drop your **GoDaddy login** into your vault at vault.igfinance.ai (or reply and we'll send you a secure one-time link to drop it in) and we'll redirect the old site to your new one, so no one lands on the outdated page.

Your email is unaffected. For now, messages to both of your addresses keep landing in your usual Outlook inbox (onwheels.tax), so nothing changes there and you won't miss a thing.

Rather hand Instagram + Facebook to us? Vault both logins (with any 2-factor / backup codes) at vault.igfinance.ai, or reply for a secure one-time link, and we'll do the profile rebrand and reconnect auto-posting for you.

Auto-posting (scheduled posts publishing to Instagram + Facebook) isn't needed for launch. Reconnect it yourself in your CRM's Social Planner anytime, or leave it to us with the vault option above.

One quick confirm: is @taxonwheelsllc your Instagram? We saw a separate @taxesonwheels that looks like a different business.

Your plan and progress live at retax.igfinance.ai.