



SUSANA'S SIMPLE ENROLLMENT GUIDE

One link. One guided client journey.

The live enrollment path keeps the client moving from the right plan to the right agreement and payment page without making you manage four separate journeys.

Your normal action

Send the client one link: packages.retaxconsulting.com. The page presents the four offerings as plans, even though the established URL says “packages.”

[Open packages.retaxconsulting.com](https://packages.retaxconsulting.com)

1 CHOOSE	2 SIGN	3 PAY	4 CONFIRM	5 FOLLOW UP
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What happens today

The client selects a plan, completes its matching public agreement, and continues in the same tab to the correct secure checkout. A successful payment then advances to the matching confirmation page.

Reassurance

You do not need to remember or send four payment links. Help the client choose the right plan and send the central link; the agreement and payment destinations are already connected.

What is still being added

A universal onboarding form and dedicated onboarding calendar will eventually sit after payment. Until that layer is built and tested, confirm the signed agreement and successful payment, then send the onboarding instructions and booking link manually.

RE TAX CONSULTING – LIVE CALL DECISION TREE

Ask → Assess → Route to the Right Package

Preserve margin. Maximize lifetime gross profit.

STEP 1 ASK & LISTEN

Get the Tax Picture

ASK THESE CORE QUESTIONS

 Who is filing? (You, Business, or Both)	 What type of entity(ies)? (LLC, S-Corp, C-Corp, Partnership, etc.)	 Where are you based and where does the business operate? (State filings)	 What did you file last year? (Forms used)	 Employees or contractors? (Payroll, 1099s, W-2s)	 Any real estate, rentals or investments?	 How is your bookkeeping? (Current, Behind, Messy?)	 Any IRS/state notices, audits, or missing returns?
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DISQUALIFICATION CHECK – If ANY answer is YES → REFER OUT

- Needs legal representation (audit defense, tax court, appeals, collections)
- Seeks tax opinions or legal advice outside our scope
- Non-US tax compliance as primary need (if US returns not required)
- Estate/trust planning, structuring, valuation, retirement plan design as primary need
- Bookkeeping only with no tax planning or strategy need
- Not a business owner (e.g., only W-2 employee with no business income)

STEP 2 BOOKS & READINESS

Where are the books today?

✓ A. CURRENT & RELIABLE

- Up to date
- Reconciled
- All records available
- No major issues

⌚ B. BEHIND (LIGHT)

- 1–2 months behind
- Minor cleanup
- Easy to catch up

⚠ C. BEHIND (SIGNIFICANT) OR UNCLEAR / NOT READY

- 3+ months behind OR
- Cleanup / reconstruction needed OR
- Not ready for monthly service OR
- Unsure of scope / entity structure OR
- Missing key info

→ ROUTE TO DIAGNOSTIC REVIEW

STEP 3 COMPLEXITY

What's driving the tax picture? (in scope only)

COMPLEXITY – CURRENT & RELIABLE BOOKS

Choose the best fit.

MEDIUM COMPLEXITY

- S-Corp or C-Corp
- Multi-state (simple)
- Employees/contractors (W-2, 1099s)
- Basic real estate (1–2 rentals)
- Standard planning opportunities

LOW COMPLEXITY

- Single entity
- Single state
- W-2s or 1099s
- Standard deductions/credits
- 1–2 rentals or none

COMPLEXITY – BEHIND (LIGHT)

Determine complexity before deciding.

LOW COMPLEXITY

- Single entity
- Single state
- W-2s or 1099s
- Simple return
- No complex planning

MEDIUM / HIGH COMPLEXITY

- Multi-entity OR
- Multi-state (complex) OR
- 3+ real estate properties or complex portfolio OR
- Trust / estate tax returns (1041) OR
- FBAR / FATCA / Crypto / 280E / R&D OR
- IRS notices, prior issues, or audit risk

STEP 4 ROUTE TO THE RIGHT PACKAGE

When pitching Growth Builder, downsell in this order:

1. Compliance Core
2. Diagnostic Review

📈 GROWTH BUILDER \$1,250 / month

Best for:

Growing businesses that need more than compliance

Includes:

- ✓ Monthly bookkeeping
- ✓ Business & Personal Tax Filing
- ✓ Entity structuring (limited)
- ✓ Quarterly financial reviews
- ✓ Notice support & strategy
- ✓ 1099-NEC (up to 20)
- ✓ Annual corporate filings (Texas Franchise)
- ✓ Monthly advisory call

If budget/need is lower →
Downsell to Compliance Core

🛡 COMPLIANCE CORE \$500 / month

Best for:

Simple businesses that need the essentials

Includes:

- ✓ Monthly bookkeeping
- ✓ Business & Personal Tax Filing
- ✓ S-Corp Election (where appropriate)
- ✓ Entity structuring (limited)
- ✓ Quarterly check-ins
- ✓ 1099-NEC (up to 10)
- ✓ Annual corporate filings (Texas Franchise)

If not ready for monthly →
Downsell to Diagnostic Review

🔍 DIAGNOSTIC REVIEW \$597 one-time

Best for:

When unsure, not ready for monthly, or books need assessment

Includes:

- ✓ Review of prior returns
- ✓ Bookkeeping quality assessment
- ✓ Entity & tax strategy review
- ✓ Missed deductions analysis
- ✓ Actionable tax opportunities
- ✓ Written roadmap & next steps
- ✓ 20–30 min strategy call

You're here if:
Behind (Light+Significant)
OR Unclear / Not Ready
OR You want clarity first



WHEN IN DOUBT → ROUTE TO DIAGNOSTIC REVIEW.
It protects margin, sets expectations, and builds trust from the start.



PROFIT PROTECTORS

- ✓ Clarify scope early
- ✓ Set expectations clearly
- ✓ Identify add-ons early
- ✓ When in doubt, go Diagnostic

The four plans at a glance

Choose the smallest plan that fully and responsibly solves the client's need. The decision tree on page 2 provides the detailed screening questions.

Financial Clarity Diagnostic \$597 one-time	Best fit: Records, readiness, or scope are unclear. Client value: A defined review, material findings, and a written roadmap before ongoing work is promised.	OPEN
Compliance Core \$500 recurring	Best fit: A stable, lower-complexity business needs a dependable foundation. Client value: The essential bookkeeping, filing, and check-in support without unnecessary advisory overhead.	OPEN
Growth Builder \$1,250 recurring	Best fit: A growing owner needs proactive reviews and more guidance during the year. Client value: Better visibility, recurring financial reviews, and advice that supports active business decisions.	OPEN
Wealth Preserver \$2,250 recurring	Best fit: Higher complexity and strategic value justify a higher-touch relationship. Client value: Deeper coordination and advisory attention, subject to confirmed fit, scope, and capacity.	OPEN

Recurring-plan terms

Compliance, Growth, and Wealth bill automatically every 28 days under a 12-month initial commitment. The \$500 onboarding fee is waived at signing. Early termination makes that fee due by separate invoice, requires 30 days' notice, and is not prorated.

Why the Diagnostic guarantee is responsible

The promise is not a guaranteed tax result. If the review does not identify at least \$500 in potential annual tax-saving opportunities - subject to eligibility, complete and accurate records, implementation, and further review - or at least one material apparent bookkeeping issue, the \$597 fee is refunded within five business days after the report is delivered. This keeps the offer valuable without promising realized savings.

Three quick decision rules

1. Unclear facts

Start with the Diagnostic. Paid clarity is safer than guessing at scope.

2. Essentials fit

Choose Compliance. Do not add complexity the client does not need.

3. Higher value

Move up only when the added guidance and firm capacity clearly justify it.

See the client journey

This example uses Compliance Core. The same four-step path applies to every plan; only the agreement, product, and price change automatically.

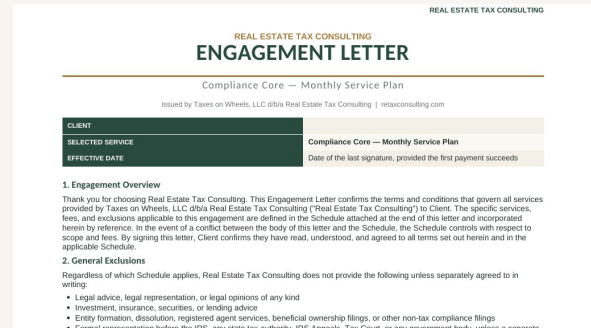
1. Choose the plan



Susana sends one central page. The client chooses the smallest plan that fully fits.

[Click the image or title to open this step.](#)

2. Sign the agreement



The selected plan opens its own public engagement letter; Compliance is shown here as the example.

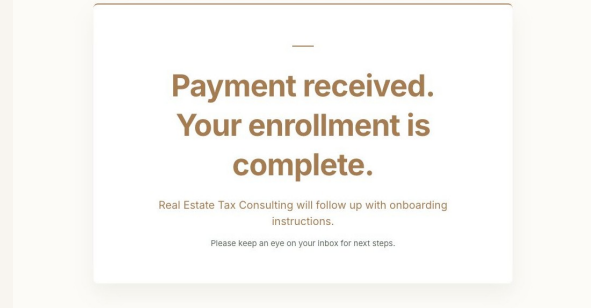
[Click the image or title to open this step.](#)

3. Complete secure payment

After signing, the client reaches the matching product and exact price - not a generic checkout.

[Click the image or title to open this step.](#)

4. Receive confirmation



A successful payment leads to the matching confirmation page and manual onboarding follow-up.

Preview only - do not send the confirmation URL as an enrollment link.

Next phase: one shared onboarding layer

After successful payment, add one universal onboarding form and one dedicated onboarding calendar before the confirmation page. The chosen plan should carry forward automatically, so neither Susana nor the client selects it twice. Sensitive tax records stay in the secure client portal.

Susana's simple operating checklist

The link to send

Use packages.retaxconsulting.com for normal enrollment. If you and the client have already selected the plan, you may send its direct agreement below.

[Open the central plan page](#)

Plan	Direct agreement - use when the plan is already chosen
Diagnostic	Open public agreement
Compliance Core	Open public agreement
Growth Builder	Open public agreement
Wealth Preserver	Open public agreement

Five steps for every new client

1. Keep one contact record per person, even when that person has more than one business; record the business details within the same relationship.
2. Confirm the smallest plan that fully fits.
3. Send the central page or the already-selected agreement.
4. Verify the agreement is complete and the first payment succeeded.
5. Send onboarding instructions and the booking link manually until the shared onboarding layer is live.

Why the URL still says packages

The public page can describe the offerings as plans while keeping the established packages.retaxconsulting.com address. This avoids unnecessary domain changes and old broken links.

Remaining system work

Add the universal onboarding form and calendar after successful payment; add payment-success gating and offer-specific workflow checks; then test all four routes on desktop and mobile, including a controlled recurring-billing lifecycle. Until that proof is complete, keep the manual verification step above.

Real Estate Tax — Navigator

REAL ESTATE TAX CONSULTING · COMPANION TO YOUR OWNER GUIDE

A lookup, not a lesson. **Part 1** is for the sales call: the questions, the return, the tier. **Part 2** is for delivery: the dates, what you owe each tier, the risks that bite.

PART 1 · SELL

1 Ask these first

You don't need the answer up front. Ask, and the return and tier pick themselves.

Ask the client...	...and it tells you
How is each property owned — your name, an LLC, or a corporation?	The return.
How many entities, and about how many transactions a month?	The tier.
Are your books current, or behind?	Behind → Diagnostic first.
Long-term rentals, or short-term (Airbnb)?	Passive vs. non-passive.
Buy, sell, or refinance anything this year?	Sale forms + recapture.
Any foreign accounts, property, or income?	Escalate.

2 Which return

Ownership decides the return. Listed most-common first — the top two are most of your book.

Owned how	They file	The one thing to know
Individual or couple with rentals MOST COMMON	1040 + Schedule E	Passive-loss rules and depreciation are the whole game.
Single-member LLC VERY COMMON	Owner's 1040 + Schedule E	The LLC is ignored for tax — same as above.
Multi-member LLC / partnership	1065 + Form 8825, K-1s to owners	Each K-1 flows to that owner's 1040.
S-corp	1120-S, K-1s to owners	Triggers your annual S-corp check (Part 2).
Sold or exchanged a property	+ Form 4797 & 8949 (8824 if 1031)	Depreciation recapture — warn them <i>before</i> they sell.
Every Texas entity	+ TX Franchise report, May 15	Filed even with no tax due. The #1 miss for a Texas firm.

Rare — *escalate, don't guess*: foreign accounts or property, trusts (1041), C-corps (1120).

3 Which tier

Every tier includes: both federal returns · the Texas Franchise report · the annual S-corp check · 1099s to the cap · monthly bookkeeping to the cap. The tiers differ on **volume** and **how much guidance**. Pick the smallest one that fully solves the need.

Tier	Fits when...	What it adds / what it doesn't
Financial Clarity Diagnostic \$597 one-time	Books are behind, scope is unclear, or prior returns need a look.	A written roadmap first — then a tier. When in doubt, start here.
Compliance Core \$500 / 28 days	One entity · books current · up to ~100 txns/mo · up to 10 contractors.	Annual review, quarterly call. No notice support. No advisory.
Growth Builder ★ \$1,250 / 28 days	Multi-entity or growing · up to ~250 txns/mo · up to 20 contractors.	+ Tax-notice support, quarterly reviews, monthly call. No forecasting or budgets.
Wealth Preserver \$2,250 / 28 days	Complex or high-volume · uncapped bookkeeping · up to 30 contractors.	+ Monthly reviews, cash-flow forecast, annual budget, two calls a month.

The three-count

Count **entities**, **monthly transactions**, and **contractors paid** — the tier declares itself. Anything past a cap is **written scope and price**, never absorbed.

PART 2 · DELIVER

4 The calendar

Weekend or holiday → next business day. Confirm each year. The two red rows are the ones that get missed.

Date	What's due
Jan 15	Q4 estimated tax.
Jan 31	1099-NEC to recipients and the IRS — no extension.
Mar 15	1120-S and 1065 returns, K-1s out. Extend → Sep 15.
Apr 15	1040 and 1120 · Q1 estimate · FBAR. Extend → Oct 15.
May 15	Texas Franchise + Public Information Report — every Texas entity, even with no tax due.
Jun 15	Q2 estimate.
Sep 15	Extended 1120-S / 1065 · Q3 estimate.
Oct 15	Extended 1040 · 1120 · FBAR.

5 The S-corp check — it's in every tier

Once a year, per S-corp client, confirm four things

(1) The owner was paid a **reasonable W-2 salary** before taking distributions — the IRS's favorite audit trigger. (2) Payroll and W-2s are done. (3) The 1120-S and K-1s are filed on time. (4) **Shareholder basis** is tracked. If (1) isn't true, that's a conversation before it's a return.

6 The six risks that bite

Risk	Your move
1 Missed Texas Franchise report	Calendar every Texas entity. Non-negotiable.
2 Late or missing 1099-NEC	Collect W-9s at onboarding, not in January.
3 S-corp owner paid no salary	Raise it before year-end, not at filing.
4 Rental losses taken against wages	Confirm the \$25k allowance or real-estate-pro status <i>first</i> .
5 Depreciation skipped — then recapture at sale	Set it up right at intake. Warn before any sale.
6 Basis not tracked	Track it yearly — it's part of the S-corp check.

7 Foreign — rare, so escalate

The one rule: worldwide income

Foreign rental → Schedule E + **Form 1116**. **FBAR** if foreign accounts top \$10,000. **Form 2555** covers foreign *wages* only, not rent. Foreign entities (5471 / 8865 / 8858 / 3520) and a foreign seller of US property (FIRPTA) → pull in a reviewer. Rare, high-penalty: don't guess.

Educational quick-reference only — not a substitute for current IRS and Texas Comptroller instructions. Thresholds and dates change; verify each year and escalate complex, multi-entity, or foreign matters.