Roslyn and I always look forward to the holidays; with one daughter in grad school and the other traveling around doing comedy shows, we rarely get to see the two apart, nonetheless together. But winter break is the one chance we have to spend time with both girls—and participate in some holiday festivities while we’re at it. We used to throw our own holiday parties and invite all of our closest friends and family members, but since we are empty-nesters, we’ve decided to forgo the party planning ourselves and join our friends at their houses instead.

Celebrating with our friends at their homes works out especially well for us this year because we’ve been so busy focusing on our business, and the big conference we have coming up, that we haven’t had any time to think about the holidays at all! We’ve got big plans for January, and it all started with a tax resolution boot camp I attended back in October. Not only did I get to hear great speakers, but I had the chance to meet with a few of my Inner Circle members as well. It’s not often that my members and I are in the same place at the same time, so I decided to host a little cocktail meet and greet. It was great getting to know them a little better, and the whole thing inspired me to connect with them (aka you) a little more often—which is one of the driving forces behind the conference we’re hosting with the ASTPS in January—The Marketing and Technology Extravaganza for the tax problem resolution niche.

The three-day event takes place on January 7th through 9th at the Rosen Hotel in Orlando, Florida, and is geared towards lawyers, CPAs, and enrolled agents who are looking to stay updated on all the latest tax resolution news. I’m co-hosting alongside the American Society of Tax Problem Solvers and together we’re discussing the 8 biggest mistakes most practitioners make when running a tax representation practice. We’ve got about five speakers lined up (one of which is yours truly) and 250-300 people in seats (one of which should be you!). If you ask me, there’s a lot going on in the tax industry these days—a lot of things that threaten life as we know it (at least, when it comes to your tax resolution practice). It’s our goal to teach you how to deal with those threats, taking 2015 by storm and show you how you can profit tremendously from these events!

Not only will this conference be educational, but it also serves the dual purpose of providing us with yet another way to meet in person and get to know one another a little better. Sure, it’s not Vegas (where the boot camp was held), but it is directly across the street from Disney World—and there’s no better way to get to know someone than by taking a spin on the teacups together. In all seriousness, I’m really looking forward to co-hosting this awesome event, and I hope to see you all there!

In the meantime, I will focus on the holidays just long enough to go through with my annual family traditions. Each year, on Christmas Eve we go to our friend’s house for a buffet dinner and a neighborhood Christmas parade. On Christmas day, Roslyn and I go to the movies with our daughters. When they were younger it was almost impossible to find a movie theater open over the holiday, but now it’s one of the busiest days of the year! We are lucky enough to have a movie theater that we can not only buy our tickets ahead of time, but choose our seats online. And then after that we go to another friend’s house for their Christmas dinner party. We don’t celebrate Christmas ourselves—we’re more the Hanukkah type—but we enjoy spending time with friends and reveling in the holiday spirit.

We hope you have an equal relaxing holiday and we look forward to seeing you in Orlando next year!

- Michael Rozbruch
PRESENT LIKE A PRO

yet, this presentation can actually change your life!
if you do an awesome job, you’ll likely be rewarded with new clients or more funding, but if you bomb, you could lose your business. No pressure. Here are five tips to ensure that your next big presentation is a smashing success.

1. Face Your Fears
Figure out what you’re afraid of (failure, ridicule or rejection) and own it. The fear will subside once you realize that life will go on—whether you land the deal or not. Rather than showing up as a jittery pile of nerves, enter the room with confidence! Even if you don’t feel it.

2. Short and Sweet
This isn’t your college speech class; you aren’t required to speak for 30 minutes without pause—in fact, your audience will appreciate the presentation more if you keep it short, sweet, and to the point. Hit them with a powerful punch line that makes an impression and call it a day.

3. Prepare Your Defenses
Your worst fear going into this presentation was the possibility of a heckler. And now it’s happening. First and foremost, don’t get defensive! Listen to their criticism, address their concerns, and get the presentation back on track.

4. Prepare for the Worst
No matter how much you practice, as Forrest Gump once said, “...it happens.” So instead of focusing on everything that can possibly go wrong, do your best to go with the flow. Think of those unexpected surprises as opportunities, not problems.

5. Just Do It
Throw on a pair of Nikes for inspiration and get in there! The more time you spend preparing this turns into a bigger deal than it actually is. But once you get talking, your nerves will magically disappear and, before you know it, you’ll be done!

Bonus Items for THEM = Bonus Items for YOU

A good way to stay on top of people’s minds is with a promotional product. The biggest example of that is the significant amount of product placement done in television and movies nowadays. Today’s promotional products are an incredible marketing tool for a variety of reasons. Even here at Michael Rozbruch’s Tax & Business Solutions Academy, we are a big proponent of giving out promo items. We received a lot of emails and even letters from people loving the cozy blanket we sent our kids instead. Rather than showing up as a jittery pile of nerves, enter the room with confidence! Even if you don’t feel it.

3. Positive Feedback: If you’re an attorney or CPA, giving your clients free gifts is one way to win their trust and facilitate good feelings. By printing your office’s name on useful, everyday items that are sure to make your clients smile, you’ll not only be creating relationships with them, but you’ll be promoting your services to whoever happens to see your client’s swag. From re-usable grocery bags to ear warmers, sending a promotional item to a client (or even a future client) is the way to go. We recommend handing out promotional items to clients, clients who’ve referred other clients, former clients, and other professionals. Maybe send a promotional gift to someone whose case has just been settled—when your company is at the top of their mind. No matter the receiver, you’re bound to make a great impression.

We work with Barbara from Barbara’s Best Impressions to handle all of our promotional needs. If you are interested in getting anything with your logo on it, and would like help on getting the items, or coming up with ideas I would recommend you check out her website: www.bbipromo.com.

IRS Terror Tale of the Month

All-in-the-family behavior might apply to some, but in Academy Award-winning actress Gwyneth Paltrow’s family, opposite-family behavior is more like it. Where Paltrow, the daughter of Bruce Paltrow and Blythe Danner, is busy involved with good behavior by “consciously uncoupling” her rockstar husband, Chris Martin of Coldplay, maintaining the lifestyle blog Goop, and feeding kids Apple and Moses any number of all natural/vegan eats, Paltrow’s paternal uncle, Robert Paltrow, has been busy being bad and is facing a tax evasion scandal. He faces three years in prison and a $250,000 fine, since he plead guilty to two counts of tax evasion. The 72-year-old vintage car racer stood accused of lying on his 2007 and 2008 income tax returns. In 2007, he claimed an earning of $101,401, which meant he only had to pay $45,114 in taxes. According to IRS reports, Robert Paltrow collected a whopping $31 million in 2007, which would have put his income tax at $481,623! The Palm Beach, Florida, resident filed similar evasions the following year, claiming to make just over $94,000, when in reality, he earned closer to $18 million. Robert Paltrow plead guilty to underpaying on his taxes for those two years by a total of $500,000. Known for his lavish lifestyle, he’s been known to keep the company of younger women and hanging out with fraud investor Gerard Haryman. Robert Paltrow’s sentencing has been set for January of 2009. Most likely famous niece Gwyneth won’t be standing by her Uncle that day, but more likely to be blending up a kale smoothie for her kids instead.

MEMBER SPOTLIGHT

W ell, With the New Year just a few weeks away, we thought we’d mix it up a little this month and do a survey. We asked, “What was your favorite New Year’s resolution and how did you succeed with it, or how long did you keep it before breaking it?” Losing weight and going to the gym was a popular response. But I have to say, overall, the success rate on the resolutions was high. We’ve listed some of the Member’s responses that were inspiring! Thanks to all of those who participated.

Resolutions are like birthdays, the older you get the less you pay attention to them. But... TaxMama’s resolution I most passionately want to keep? To keep my desk clear and all my papers (in this paperless world) filed away. How long does that last? Honestly? About an hour or two after I put everything away.

Eva Rosenberg, EA

Back in 2000, I decided to never shop with credit cards again. I had a great job making lots of money. But I really spent too much and didn’t feel I had enough to show for it. Thought going back to saving for what I wanted was more practical. Now I actually take pride in the fact I’ve learned to shop with more patience avoiding the high-priced boutiques I used to frequent. And more importantly, I’ve taught our two daughters to do the same. It can take more time to decide on a purchase, and even take longer to purchase, but having no bills is worth it!

Karen M. Lee, CPA

I do not make New Year’s resolutions, per se. The only “resolution” I made was a promise to lose weight a few years back. I am proud to report I’ve lost nearly 60 pounds and have about 15 to 20 more to go.

Ron Friedman, CPA

Honestly? About an hour or two after I put everything away. I will generate $100,000 of income for tax resolution cases.

Ralph Nelson, EA
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Minutes for Dollars, Dimes or Pennies

The old adage, “time is money,” is one that should truly be taken to heart. You value your time, and at times it’s hard to prioritize. Old habits come into play and, in general, we tend to value ourselves at lower rates than we are worth; so what do you spend your time currency on? For many, we are used to investing time in menial tasks to save money and resources, but when does that investment actually become a deficit? If you implemented my fix/flat fee pricing model for tax resolution work, it stops making sense to DIY on endeavors that aren’t giving you adequate returns.

Stop doing $15 an hour work when you’re so much higher on the pay scale! Did that $199 printer break? Sure, it might seem like you are saving money trying to repair it, but why waste your most valuable currency on something that is giving you no substantial return? Spend that time in a pursuit that will give you a better yield, and you’re no longer losing time, you’re maximizing it. Instead of spending two hours on that printer, embrace delegation or simply replace it with a new one. Owning your business decisions means knowing where your talents are best used. It’s not just restricted to electronic repairs - if it’s not your explicit job, your expertise is more crucial to generating income than clerical or administrative or run-of-the-mill customer service functions and the like.

Entrusting tasks to someone else, who probably does them better, doesn’t mean they’ve been abandoned; it requires the same level of detail that you devote to the rest of your professional life. As the expert in your field, you don’t have to entertain staff members who are unable to hold down the fort without you. Training competent employees who are able to contribute rather than be carried is the key to effective delegation. Excelling in delegation makes you a more effective and productive leader and entrepreneur. Employees MUST make your life easier.

Keep mowing the lawn at home (research shows that cut grass actually produces happy-mower chemicals!), but leave non-therapeutic menial tasks at the door. Free yourself and embrace the value of your time. After all, you and your business deserve this!
The American Society of Tax Problem Solvers (ASTPS) and Michael Rozbruch’s Tax & Business Solutions Academy Presents...

IRS Tax Problem Resolution MARKETING & TECHNOLOGY EXTRAVAGANZA!

HELD AT: the Rosen Plaza Hotel in Orlando (close to Disney World and Universal Studios)

CPAs, Attorneys and EAs who want to learn more about attending the January 2015 Extravaganza can visit http://bit.ly/orlando2015
THIS MAY BE THE MOST IMPORTANT LETTER YOU RECEIVE ALL YEAR!

Please read and consider what I’m saying very carefully. I have news you need to know to protect your practice, your career, and your family in the months ahead.

THERE IS A NEW THREAT IN THE TAX RESOLUTION INDUSTRY, AND IT COULD BE THE BIGGEST CHALLENGE OF YOUR CAREER...

Did you know that a few months ago, a major national tax preparation company decided to enter the tax problem resolution business? And I don’t mean in small way. That’s causing all the other major tax preparation firms to jump on the band wagon.

This is the biggest threat in years and you probably haven’t even heard much about it. Nonetheless, it is a serious threat to your business. Here are a few questions you should be asking yourself:

• Can you compete if a major tax prep firm starts offering tax problem resolution services on every street corner in your community?
• Will your fees be compared to the tax mills rates for tax problem resolution work?
• Would you benefit from knowing the secrets you can employ today to not only survive this threat, but to thrive?
• Have you seen the Liberty Tax ads promoting tax problem resolution services?
• Why do you think H&R Block bought Beyond 415?

It isn’t my intent to simply frighten you.
That would be unproductive without offering solutions. While it’s smart to acknowledge the dangers out there, and to take steps to protect yourself, it’s not the end of the world.

WHAT DO YOUR TRUSTED INDUSTRY LEADERS THINK?

THE BEST RECOGNIZED LEADERS IN THE TAX PROBLEM RESOLUTION INDUSTRY ARE GATHERING IN ORLANDO FOR THE MARKETING AND TECHNOLOGY EXTRAVAGANZA FROM JANUARY 7-9, 2015

Nothing is more important to the future of your practice than learning of the looming threats and how to thrive in this new environment. You will hear all the experts’ opinions, analyses, and plans for moving forward; nothing will be held back.

Our Simple, Straightforward, No Strings, Guarantee.
If at any time during that first day you don’t think this event will help you grow and thrive in the tax problem resolution industry and ward off the threats addressed in the State of the Industry Address, then ask any of the sponsors’ representatives to authorize your refund of the registration fee. You will receive a 100% refund within 7 days of the seminar no questions asked. This event is for practitioners who are intent on growing and thriving in the tax problem resolution industry.