

11271 Ventura Blvd #612
Studio City, CA 91604

Inside This Issue

- pg 1 • *Something Special for Our Members*
- pg 2 • *As I See It*
- pg 3 • *From the Practice Corner*
- pg 4 • *Member Spotlight*
- pg 5 • *Save the Date*
- pg 6 • *Shoutouts!*
- pg 8 • *IRS Terror Tale of the Month*

IRS Terror Tale of the Month **Money Mismanagement Leaves Rock 'n' Roll Heiress Singing the Blues**

Divorce can be messy, but when you live in the limelight, all that drama ends up in the public for everyone to see. In June 2016, Lisa Marie Presley, the only daughter of Elvis Presley, filed for divorce from her husband, Michael Lockwood. Lockwood demanded Presley pay his \$450,000 in legal fees and provide \$22,000 in monthly spousal support. In February 2018, a judge



gave Presley 30 days to pay \$100,000 of Lockwood's legal fees. The rock 'n' roll heiress claimed she would be unable to do so because she was in debt for over \$16.7 million. However, the biggest source of Presley's debt is the \$10 million she owes the IRS in unpaid taxes from 2012 to 2015.

In addition to hundreds of thousands of dollars in credit card bills, court documents show Presley defaulted on the mortgage of the \$6 million home she owns in the United

Kingdom. This is shocking news, considering Presley inherited her father's \$100 million estate in 1993 when she turned 25. Today, Presley claims the fortune has dwindled to \$14,000. She's claimed that her financial distress is primarily due to the "reckless and negligent mismanagement and self-serving ambition" of her former business manager, Barry Siegel.

Presley is not the first celebrity to owe big bucks to the IRS or blame the loss of their fortune on poor money management. In 2009, actor Nicolas Cage sued his former business manager for alleged mismanagement that cost him millions. However, regardless of who is to blame for the poor management of the Presley estate, Lisa Marie is still expected to pay off the debts and answer to the IRS for her unpaid income taxes.

MC Hammer who filed for bankruptcy in 1996, has faced similar tax problems. He might be known for singing, "U Can't Touch This," but the IRS thinks differently; they sued him for back taxes owed.

Moral of the story: It doesn't matter if you're rich or poor, a commoner or a celebrity. If you don't pay what's owed to the IRS, they will find you, and you could end up in "Heartbreak Hotel!"



The Roz Report

MAY/JUNE 2018

888.670.0303

WWW.ROZSTRATEGIES.COM



AUTHORIZED MEMBER 2018

As seen on... **Inc.**

Big Things Are Coming! Celebrating 4 Years With Our Members

There is nothing more relaxing to me than detailing my supercharged '68 Olds 4-4-2 before I take it out to race or display at a car show. On weekends, I take my special cleaning equipment and cloths and make her shine. In the garage, I have a dedicated cabinet where I keep all my cleaning paraphernalia. But when it comes to cleaning anything else, it's a chore. I mean, let's be honest — I like things to be clean, but who likes to clean? Sometimes I have a hard time straightening up my office, and Roslyn will come in and ask, "Do you need this on your table? Have you read this book?" and she will tidy it up. Believe it or not, it's something that she likes to do.

Roslyn and I also like to do different things in our business. Where I have the experience in tax resolution and like teaching and coaching, she likes creating products, putting on our events, and a variety of other things that sound like fun to her but maybe not so much for me. Recently, she took a look at our Insider's Circle members' website and said, "We need to update this!"

As many of you know, we work closely with Hugo and Isaac at Just Digital not only to do our social media marketing, but to do so much more. Roslyn and Hugo sat down the other day to redesign the members' site. Now, don't worry, we're not taking away any valuable features or raising the price for our existing members. We looked into the resources our members use the most and are making them easier to find and more interactive. Roslyn and I took a lot of feedback from our members and will use it to make our website more useful to them.



One thing leads to another, and it got me to thinking about updating the Insider's Circle membership overall. This June, we're celebrating our four-year anniversary since we launched our Tax Resolution System and membership. We've done a lot over the last four years to help our members build and grow their practices, and we will do even more in the future.

Another event on the horizon is our third-annual Tax Resolution Success Summit, which will take place in Austin, Texas, from Aug. 23–25 at the Westin Hotel. Insider's Circle members always receive a discount on the ticket price and an even lower-priced ticket to bring a guest! We love meeting new members and reconnecting with ones we haven't seen since last year's event.

Every year, we aim to make the Success Summit better than the year before, and I think we've really outdone ourselves this year. We have a number of excellent speakers lined up — in addition to myself. Not only is this event an opportunity to get great information, it's also a perfect chance to connect with other very successful tax resolution professionals.

Last year, tickets sold out weeks before the event, and we had to turn people away. This year, we booked a bigger room, but I wouldn't be surprised if tickets sell out before Aug. 23. So if you're thinking about coming, buy your tickets now.

Roslyn and I said we wanted 2018 to be the year our members get more. We are honestly our members' biggest cheerleaders, and when people come to us for help, we want to deliver. There's a lot in the works this year: a refreshed membership with a new website and an event that's bigger and better than ever. These initiatives are our way of delivering on the promises we've made to our members and thanking them for supporting us through the years.

Here's to many more!

-Michael Rozbruch



FOOD FOR THOUGHT:

BY ROSLYN ROZBRUCH

ABOVE ALL, HAVE FUN

Whoever said, “Sticks and stones may break my bones, but words will never hurt me” was a liar. Words are powerful. I think we all know how negative words can have an adverse impact on your business, even something like a bad Yelp review. Words can also bring out the best in us. In a previous Food for Thought column, I wrote an article titled, “Three Words to Change Your Life for the Better,” where I talked about picking three words that describe the person you want to be and starting your day by saying them.

I love using words to motivate and inspire me. Every morning, before I say my three words (I am focused, disciplined, and confident), I receive an email with an inspiring quote from a site called About Meditation, and it’s a great way to start my day. But besides setting my intention for the day with words, I am lucky to be surrounded by positive words at work.

Last year, Michael and I were given a culture wall as a gift from our mastermind coaches, Joe Polish and Dean Graziosi. Gapingvoid is the company that created our culture wall. Their philosophy is “People become the ideas that surround them.” More specifically, they believe that art combined with messages can have a positive impact that will affect real change in the people in your office. The artwork and messages in our office were formed from Michael’s and my beliefs about our business, the people who work for us, and most importantly, our beliefs about our members and clients. We filled out a form answering a series of questions and worked with someone who then created our culture wall — and I love it!



If you look at the picture on this page, you can see our wall with our pictures and messages, and if you look closely, you will see how important our members are to us! Michael and I aren’t the only people with these beliefs. We want our team to share that same attitude, as well.

Of the 10 pictures, I do have a favorite — the one that captures the essence of who I am. Anyone who knows me knows I’m all about having fun. Having a good time is a main philosophy in my life. No matter what I’m doing, I’m always thinking in the back of my mind, “How can I have fun with that?” In the front of my mind, I’m always thinking of what I can do that’s fun, when I can do it, and who I can do it with. So, my favorite picture is the last one: “Above All, Have Fun.”

Now that tax season is over, I hope you are making time to have some fun. And if you want to have fun while learning, you should definitely come to our third annual Success Summit in August! Register at rozstrategies.com/austin. Just know that when you call for help with your tax resolution business, we’ll not only be courteous, we’ll also be happy to help.



—Roslyn Rozbruch

FROM THE PRACTICE CORNER

BY MICHAEL ROZBRUCH

One of the easiest and **most affordable** ways to get new clients is to have other experts refer them to you. Below is my winning Eight-Step Formula.

The Easy Eight-Step Formula to Get Other Experts to Refer to You:

STEP 1:

Identify who you want to contact—bankruptcy attorneys, Realtors’ mortgage brokers, other CPAs, EAs, and/or unenrolled preparers.

STEP 2:

Buy, rent or otherwise obtain a list of their names and addresses. There are several ways to accomplish this. For example, you can use the state bar and licensed Realtors membership directories (ask your lawyer and Realtor friend/colleague for help), manually develop a list from AVVO or LISTSERV, or use a reputable list broker like macromark.com.

STEP 3:

Create a personalized and customized letter to mail to them. (These are contained in the Tax Resolution Domination System and on the Member’s website)

STEP 4:

When you’re mailing to other professionals, give them something of value. For example, if you’re mailing to attorneys, you could send them a report on how the IRS audits attorneys. Or if you’re mailing to Realtors or mortgage brokers, include a report on the five largest tax deductions that most Realtors or mortgage brokers miss.



STEP 5:

Mail them three times. **Do not stop after the first mailing!** Make sure you mail them three times. That’s when you will get your best response for any type of list.

STEP 6:

Make sure you add a sentence referencing the previous letter. Letter No. 2 should refer to letter No. 1, and letter No. 3 should refer to letter No. 2. (These can be the same letter.)

STEP 7:

Include your brochure and business card with each mailing.

STEP 8:

Put them on your monthly mailed newsletter list after you’ve mailed them three times so that you are top of mind when they have someone to refer.

—Michael Rozbruch



MEMBER SPOTLIGHT:

MELINDA (MENDY) OWENS, CPA

Ask about a person from the Midwest, and you're likely to hear things like "She's so friendly," "She loves to help people," and "I feel like I've known her forever." Say what you will about stereotypes, but this particular one seems to ring true, especially for Melinda (Mendy) Owens, CPA, of Greenfield, Indiana. This mom of four sons (and now one daughter-in-law) was born in Indiana, went to college at Ball State, and has been married for 27 years. The family also has three Saint Bernards and one "Saint Dane," a Saint Bernard/Great Dane mix. It's a busy, joy-filled household. Not surprisingly, the joy of helping other people is the "why" for Mendy when it comes to solving her clients' tax problems.

"Whenever someone calls me with a tax notice and I am able to call the IRS and get them out of the fee, it gives me the most joyous feeling!" she exclaims. One case in particular stands out for Mendy. Her client is a 70-year-old business owner who got behind on his payroll taxes. He owes \$53,000 in penalties and interest, and when he came to Mendy, he was in danger of losing his business. Mendy was able to put him into Currently Not Collectible status, and now she is working on an offer in compromise. "It's a double success story," Mendy says. "We're in the process of doing the final part of it, but the first part of it — he was so ecstatic. It just makes me feel really good that we could do that for him."

Asked how long she has been doing tax resolution, she flashes a quick grin and says, "I've actually been doing it longer than I thought." A few years ago, Mendy attended a seminar with one of her employees where Michael was speaking, and her employee leaned over and asked, "Don't you already do this kind of work?"

The answer was actually yes ... and no. Mendy says she quickly learned that she was not charging enough for her tax resolution services. A main benefit of her Roz



Melinda Owens

Strategies Insider's Circle Membership was to build her confidence in what she already knew and to round out her education on the finer points of doing tax resolution work.

"I was glad I bought the course, because it gave me the rest of what I didn't know," Mendy says. "I didn't want to potentially hinder a client from being able to get an offer in compromise or a Not Collectible status. I didn't want to do something wrong."

Recently, Mendy also purchased the Audit Protection Plan. She has found that most of her clients see the value of purchasing a plan, and with 500–600 tax-return clients, offering the plan provides a significant boost to her practice's bottom line.

Mendy also looks forward to having more time to pursue her other passions: writing, directing, and acting. "God gave me a gift of being able to write," Mendy says, "so I write skits for my church, and I enjoy putting on productions. It's one of my favorite things to do."



Tax Resolution
Success Summit
SUPERCHARGE YOUR PROFITS 

SAVE THE DATE ...

Roz Strategies 3rd Annual
**MARKETING AND SALES
SUCCESS SUMMIT!**
FOR TAX RESOLUTION PRACTITIONERS

DATE: August 23–25, 2017

**WHERE: Westin Hotel
Downtown Austin**

Receive 2 1/2 days of implementation and demonstration
on how to get more prospects to retain you.

By the time you leave the conference on Saturday, you'll have an actionable marketing plan that fits your individual circumstances, plus you'll know how to "close" prospects, so you can start reaping results Monday morning!

REGISTER NOW!
rozstrategies.com/austin



SHOUT OUTS!

Kudos to **Greg Nunn** for closing 10 new cases in one month! Sales were \$51,000, plus additional work that will probably come with some of these new clients.

Breakdown of sales: Radio Sales \$26,450; Referral Sales \$24,550

Why the success?

1. Consistency on the radio
2. Follow-up, follow-up, follow-up
3. Assumptive close and detachment
4. Conviction of talents and abilities
5. Great mentoring from the Rozman (Greg was in Michael's mastermind group for two years!)

Congratulations to **Josh Dixon** for being a guest expert on the DFW Real Estate Show with Jenna Ryan to talk about taxes and tax problems! Josh, this is great info to add to your marketing materials.

High-five to **Mathew Hazan** who placed an ad in a Pakistani newspaper in NYC that he translated from English. He ran the ad for two days and had one client retain him on the spot!

Congratulations to **Peter Marchiano** on his client's recently accepted offer. The original amount owed was around \$172,000. The IRS settled for \$33,655, and Peter's client was ecstatic! "It's basically 20 cents on the dollar," says Peter. "And the satisfaction of helping the client not only get their tax situation settled but also get their life back in order is priceless."

Congratulations to **Alan Pearlman**, for settling an IRS \$1.1 million tax debt, for less than \$7,000! He was also able to obtain an OIC for the same client with New York State, which is very difficult to accomplish. Way to go! Amazing results.

Congratulations to **Chris Evans** and **Peter Philando** for reporting the highest extra income earned so far this tax season on the APN Member's Facebook page.

Congratulations to **Kevin Huston** for being interviewed on a local TV station on tax identity theft and the Audit Protection Plan. Way to go Kevin!



Kevin Huston hard at work!



*Not only do we have our members covered, we cover their children, too! Thank you to **Mario Pizzamiglio** for sharing this adorable picture of your children. Glad they like the blanket!*



Audit Protection Plan Shoutouts!

Congratulations to **Marc Barnes** who just bought a new mountain bike with deep carbon rims with the extra revenue he earned from his APP sales. Talk about Supercharging Your Profits!

High-five to **Sherry Borshoff** for letting us know she is experiencing a 98 percent take rate, with most signing up for at least the silver plan.

Kudos to **Patrick Astre** who shared that the response from his clients is very positive, with most people buying it, and to **Diane Lash** and **Mendy Owens**, who are also having a great take rate.

Do you have a story or picture to share with us regarding something you've implemented, client you helped with a tax problem, or anything else? If you do, email it to info@RozStrategies.com, so we can send you a shoutout!

WELCOME, NEW MEMBERS:

<i>Timea Antal</i>	<i>Karin Larson</i>
<i>Mathew Hazan</i>	<i>Mark Colella</i>
<i>Rick Archer</i>	<i>Arthur Lee</i>
<i>Leo Hill</i>	<i>Christine Fuller</i>
<i>Patrice Berry</i>	<i>Brian Ludwig</i>
<i>Bill Huss</i>	<i>Angela Navarrete</i>
<i>Kerri Blenker</i>	<i>Deaphalis & Thelma Sample</i>
<i>Michael Jakusovas</i>	<i>John Turner</i>
<i>Scott Brumley</i>	<i>George Stameroff</i>
<i>Edward Caine</i>	<i>Michael Uadiale</i>

Happy birthday to our members!

May

*Brandon Metcalfe
Greg Nunn
Jong Lee
Josh Dixon
David Behr
Ken Mullinax
Jesus Abikarram
Bill Huss
Rick Archer
Daniel Silvershein
George Leddicotte*

June

*Esther Phahla
Mark Klecka
Jodi Lovell
Denise Mensa-Cohen
Dmytro Arshynov
Ron Friedman
Lee Hubbard
Tony Juarez III*

