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IRS Terror Tale of the Month

HIP-HOP MANAGER TRIES TO GIVE IRS A BAD 'RAP'

Derrick Lawrence isn't exactly a household name, but the artists he's represented in the past, including Drake and Lil Wayne, certainly are. Co-founder of the label Aspire Music Group and manager of numerous hip-hop icons, Lawrence has joined the list of many celebrities charged with tax evasion.

In April of this year, Lawrence pled guilty to three counts of tax evasion after failing to file personal tax returns in 2009, 2010, and 2011. During these three years, Lawrence enjoyed profits of over \$2.2 million, thanks in no small part to the exclusive deal Lawrence signed with then-up-and-coming rap superstar, Drake, in 2008. Lawrence plead guilty to all three counts and blamed his former accountant in open court, saying, "I failed to pay my taxes, which I left in other people's hands."

This isn't the first celebrity tax evasion case to cite bad accountants as the cause of grief. In the recent past, actors Nicolas Cage and Stephen Baldwin

both claimed their tax woes were caused by the bad advice of accountants or business managers. However, Lawrence has taken full responsibility for his situation.

"I hired an accountant but didn't follow up," Lawrence told Magistrate Judge Peggy Kuo. "It was my responsibility, but I was traveling."

Stacey Richmond, Lawrence's lawyer, stated her client wants to "do right" by the court and has already begun to pay off over \$750,000 in restitution. In addition to the fines, Lawrence faces up to three years in prison, one for each year he failed to file taxes.

This is an important lesson for Lawrence and for anyone who doesn't file legally required income tax returns. The IRS doesn't care who you put in charge of your taxes or finances. When it's your name on the line, make the time to be sure your taxes are filed when they're due.



Michael Rozbruch's
**TAX & BUSINESS
SOLUTIONS ACADEMY™**

SEPTEMBER/
OCTOBER 2017

As seen on...

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What's on the Horizon?

As of writing this, we are getting ready to go to Nashville for our second annual sold-out Tax Resolution Success Summit. You will be reading this after our event. That's the way deadlines go sometimes for newsletters. The pictures from the event will have to wait until our next newsletter. I can say, it's exciting to see so many of our members have taken advantage of our 50 percent member discount and have signed up to join us! Roslyn, Becky, Sue, and I are looking forward to meeting and talking with everyone who will be there. We have a keynote speaker for the first time: Kute Blackson, who is amazing and inspiring. Everyone in attendance will receive a copy of his new book, "YOU.ARE.THE.ONE." Also, being in downtown Nashville provides plenty of opportunities for fun outside of the event. We're already looking forward to doing it again next August, with another fun destination in mind!

Of course, ticket discounts aren't the only tangible perks members enjoy. We like to plan ahead, and just like how we're already putting the wheels in motion for next year's Summit, we also spend a lot of time looking for ways to add value to our members' experience.

We appreciate all of you and want to see you enjoy great success. At the moment, we have a number of top-secret plans in the works, but there is one thing I can share with you right now. In November, we're formally launching a new product: The Audit Protection Plan System and Toolkit. You can find full details about the Master Class workshop I will be teaching in this issue of your newsletter, but to put it simply, the Audit Protection Plan System and Toolkit acts as a safety net you can provide to your clients that clients WANT. With this worry-free audit protection, your clients will rest easy, knowing that if they ever get an IRA/State income tax

notice, are selected for audit, or have their tax identity stolen, you'll have their back.

I did a "soft" launch on this product last January at our MTE Conference in Orlando, and I've been receiving great feedback from those who have implemented this new system. One of our members, Chris Churchwell had a 96 percent client "take-rate" and generated \$50,000 in PASSIVE net income this tax season alone for doing the same amount of work he was already doing.

Audit protection might sound like a lot of extra work, but what a lot of practitioners don't realize is the IRS isn't auditing taxpayers like they used to. Plus, this service doesn't require any advertising, marketing or selling on your part. And with an automatic client enrollment feature that's unique to this system, we're seeing client participation rates between 85 and 96 percent! This one product will be a game changer for any practice.

Your client's biggest fears are getting notices from the IRS, being audited by the IRS or having their tax identity stolen. They fear having to shell out thousands in audit or tax ID remediation fees. As their most trusted personal advisor, who knows everything about their financial affairs, they're looking to you to provide this valuable protection. They want to know that you're going to go "to bat" for them when these issues arise. They WANT this service from you and will pay an annual fee for this protection. For those of you who are not already providing this service you are leaving a lot of money on the table. Not only that, but this is passive income to you, meaning there is absolutely no extra work you need to do that you're not already doing. Oh, and did I mention a client who takes audit protection for 2017 will most likely take it every year going forward.

- Michael Rozbruch



FOOD FOR THOUGHT:

BY ROSLYN ROZBRUCH

Michael and I recently attended a four-day retreat just outside of Chicago called Lifebook. It was an amazing experience at a place owned by Jon and Missy Butcher, a couple from the mastermind group we belong to. Without going into all the details in this column, one of the **many** takeaways I came home with is being

conscious about my life and how I live it. What's interesting is that over three years ago when Michael embarked upon starting our business, **everything** in our life was

changing: One daughter graduated college and moved up north to attend grad school; our other daughter also moved and decided to focus more on her stand-up comedy; we sold our dream house (which was too big for the two of us) and decided to rent until we figured out what the right size of our next house would be; and our favorite restaurant that we ate dinner at every Friday night since our second date (over 33 years ago) went out of business. Since that time, I think Michael and I have been very conscious of how we've been navigating this chapter of our lives. Attending Lifebook took our consciousness to another level of awareness.

Saying we took our consciousness to another level sounds a little woo-woo, but another way to look at it or define it is to say we learned how to be strategic about the choices we make in our lives. It sounds peculiar to say that after attending a self-improvement retreat I learned how to be strategic in my personal life, but actually it makes total sense. Michael and I are very strategic in our business. We set specific goals and map out a written plan to attain these goals by a specific date. In my personal life, I have set goals for myself: the vacations I want to take, my exercise routine, and the friends I make an effort to spend time with.

So many times, we are on autopilot with our lives. We have an idea of things we want to do, but maybe it's a fuzzy idea. Attending this event helped us

“ We have an idea of things we want to do, but maybe it's a fuzzy idea. Attending this event helped us focus and get more clarity on each area of our lives and set specific goals. ”



focus and get more clarity on each area of our lives and set specific goals. There are 12 life categories that make you who you are, and some of these categories include health and fitness, relationships and love, parenting and social, and money and career. Within each category, we were asked to reflect on four areas: (1) Premise: What are our beliefs in this area? (2) Vision: What do we want for ourselves in this area of our life? (3) Purpose: Why do we want this for our life? And (4) Strategy: What are the steps we will take to make this happen in our life?

Michael and I came home not only re-energized and excited for what we have planned in our personal lives, but we also came home with an actual book (our “Lifebook”) with everything printed out and the templates on our laptops to revise whenever we want.

So, here's my question for you: What are your beliefs, visions, whys, and strategies for your life? Do you have specific, personal goals for yourself with a strategic plan to achieve them? It's something to think about. If you are interested in learning more about Lifebook, check out their website: mylifebook.com. If you have questions you can reach out to the president, Sandra Garest at sandra@mylifebook.com. If you decide to attend, mention Roz Strategies and you will receive a discount.



- Roslyn Rozbruch

OUTS!



Congratulations to Perry Cronin, CPA and first-year mastermind member, for getting a \$100,000 fee on a new case! Perry used our “High Ticket Sales Strategy” and value propositioning regarding his fee. If all goes as planned, Perry's client will walk away from a \$3 million-plus IRS tax liability for about \$50,000! If Perry relied on the old, traditional bill-by-the-hour model, the fee would have been between \$10,000 to \$20,000. Well done, Perry!

WELCOME, NEW MEMBERS:

Douglas Gignac	Raymond Kidwell
Dawn James	Miguel Palma
Michelle James	Jonathan Ton
Denise Prowell	Raymond Wagner
John Litman	Seymour Williams
Rafael Alvarez	Tryfon Hristopoulos
Leslie Bennett	Richard Pasquantonio
Mark Hesseltine	
Pauline Ho	

Happy birthday to our members!

September

Thomas Gearhart
Sam White
Sharon Lewis
Ronald Foudy
Douglas Gignac
Harry Miller
Steve Shapiro
Vicki Bott

October

Joan Grispin
Mary Karpowicz
Greg McCauley
Janet Sikiyan
Mark Schneider
David Magee
Larry Stephens
Deltrease Hart-Anderson
Richard Pasquantonio



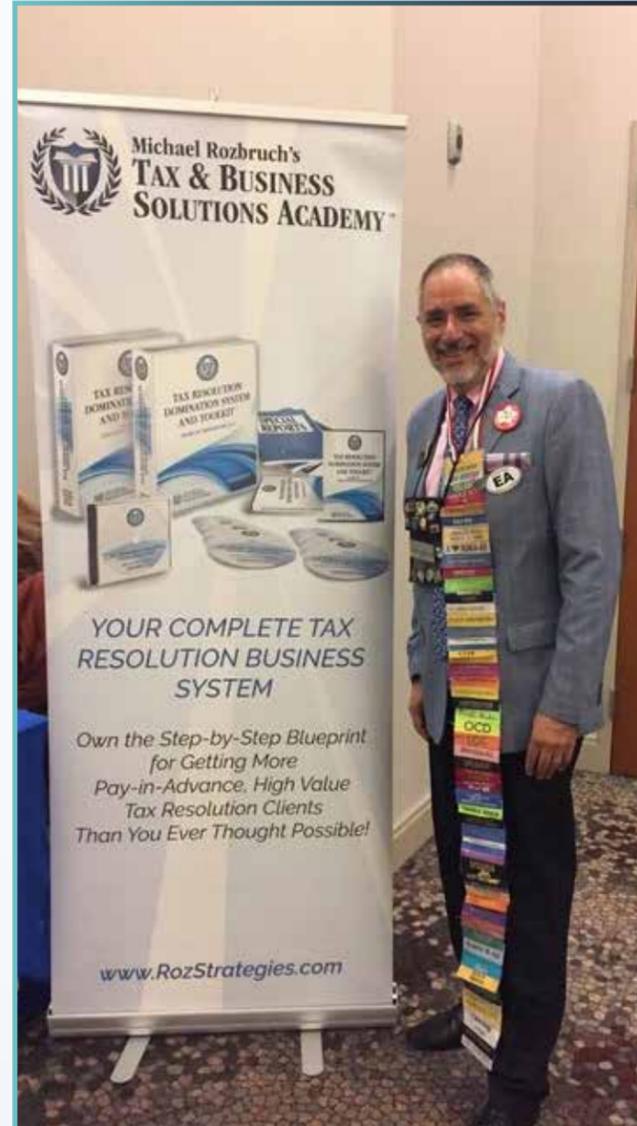
SHOUT

Michael recently spoke at the Florida Society of Enrolled Agents (FSEA) annual convention in Orlando. VIP Insider Circle member and FSEA Education Chair Jeff Schneider taught several classes over the three-day event, but he removed his nametag with ribbons to the floor before teaching. His lovely wife, Ali Schneider, is the executive vice president of FSEA and worked hard to put on an educational and fun event.



Sergio Alves at the FSEA Convention ^^

Jeff Schneider >>



FROM THE PRACTICE CORNER

BY MICHAEL ROZBRUCH

One of the most effective and least expensive ways you can get retained by new tax resolution clients is by using online chat on your website as a marketing strategy.

You want to give your prospect every opportunity to contact you *today*. One inexpensive way is by utilizing online chat on your website. Here's how it works: When a visitor goes to your website and spends a significant amount of time on it, you can have a box pop up that allows you to chat with that person. It's like text messaging or instant messaging. Nowadays, a lot of people would rather text message than receive a phone call or email, at least at the beginning of a relationship.

It's important you have someone available during normal business hours to monitor and

answer the prospective client's chat questions. The main goal of online chat is to get an email or a phone number so you can call the person back, get more information, and ultimately retain them. It's very important that once you obtain their phone number you call them back immediately. The more time that lapses between the time the prospect reached out to you and the time you call them back, the more sales and fee resistance you'll encounter. It's just another way for potential clients to contact you.

One of the major benefits of online chat is that it's easy to install. So, not only is it a great marketing tool, it's also inexpensive to put online chat on your website. Check out livechatinc.com.

- Michael Rozbruch

MEMBER SPOTLIGHT:

DELTREASE HART-ANDERSON, EA

Deltrease Hart-Anderson, EA, is a lifelong learner and a voracious consumer of information. She takes full advantage of everything she is learning as a member in the VIP Insider's Circle.

Since becoming an enrolled agent in 2014, and even before earning her EA credential, Deltrease has made it her mission to learn how to best solve tax problems for her clients. "I have always been approached [with tax resolution questions] because I am a tax preparer and an accountant," she says. "Now I'm an EA, and I have CPAs as well as unenrolled preparers asking me how to fix certain things."

When she first began doing tax resolution work, Deltrease said she needed to learn when to use the different types of resolution options and how to set appropriate expectations for her clients. "If someone had several years [of tax returns] to be filed, letting them know, hey, just because we filed the returns for you yesterday doesn't mean we can resolve your case tomorrow or today," she explains. "You have to wait on the IRS to process the returns."

Deltrease also stresses the importance of using systems to build a successful tax resolution practice. "Having engagement letters in place, having systems where [clients] can pay, I have a recurring billing system, so more client engagement and automation has helped me thus far," she says.

And Deltrease is careful to observe Michael Rozbruch's No. 1 command: "I get my fee first



Deltrease Hart-Anderson and her husband Andre Anderson.

upfront. I bill first, and I don't start work until I get payment now, which was a problem for me in the past."

The more Deltrease learns about tax resolution, the more problems she puts in the past, both for herself and her clients. She is having great success with submitting properly structured installment agreements, putting taxpayers into uncollectible status, and receiving penalty abatements for her clients. In a recent case, she saved her client \$8,000 because he had reported and paid taxes on 1099 income on his business return, but the IRS was seeking payment for the same income on his Form 1040.

Originally from St. Matthews, a small town in South Carolina, Deltrease now owns and operates D Hart Accounting and Tax Services in West Columbia, South Carolina, which she describes as "still a small town, but much larger than St. Matthews." She earned her undergraduate degree from South Carolina State University in Orangeburg, and a master's in taxation from Strayer University.

Deltrease and her husband of 11 years, André, enjoy traveling for pleasure and to visit family. And as a lifelong learner, she also enjoys attending tax and accounting conferences.

FREE Online Workshop

THURSDAY, NOVEMBER 9, 2017

HOW TO IMPLEMENT YOUR OWN AUDIT PROTECTION PLAN

Discover This ONE PROVEN and SIMPLE strategy – adds thousands to your bottom line without having to add one new client or spend a penny on advertising!

HAVE YOU EVER HAD ANY OF THESE CHALLENGES?

- Performing post-filed return work for free because you're afraid to bill for it
- Losing 1040 clients to DIY online companies
- Afraid of increasing tax prep fees
- Feeling unappreciated by your tax prep clients

NOW, IMAGINE HOW GREAT IT WOULD FEEL TO ...

- Have more than 85 percent of your 1040/1120 clients AUTOMATICALLY enrolled in your audit protection plan that happily pay you more money without increasing your tax prep fees
- Get compensated for all post-filed return work you never billed for
- Unlock PASSIVE income that's just waiting to be transferred to you that's recurring every year
- Gain an unfair advantage by competition-proofing your practice and "locking in" your client
- Be valued by your clients

HERE'S WHAT ONE PERSON HAS TO SAY:

"We've had a 96 percent client take rate that we've shown. In total, we will have added about \$50,000 in additional net income this tax season. We can't believe how easy this was to implement. And the best part is this will become a recurring annual income event year after year."

-Chris Churchwell, CPA

PRESENTED BY MICHAEL ROZBRUCH, CPA

"This is not your ordinary audit protection plan that most CPAs, EAs, and tax preparers offer their clients. Register TODAY to find out why this system has an over 90 percent client participation rate! This webinar is for tax preparers who prepare thousands of returns!"

Learn how to add an additional \$25,000-\$50,000 in PASSIVE recurring revenue every year doing the same work you're already doing.

To register, visit www.rozstrategies.com/app/ now!