

NOW WHAT? NEXT STEPS IN THE STC PROCESS

STRATEGIC TAX COACHING "STC"

Since each STC program is custom to each client, some programs take longer than others to complete. You **want us** spending time asking more questions, interacting with other professionals on your behalf, and digging deeper to find every last penny of tax savings strategies for you! So, let's talk about the process & expectations.

OVERVIEW & TIMELINE

“Our customer care team will be calling you each month with an update until your plan is complete. Stages 2 & 3 take the most time and can be overwhelming. During this time, the team may come back to you multiple times with questions. Remember to hop on questions as soon as they are asked so that we can continue to analyze the data to maximize your savings!”

1 After all your information has been submitted, the creation of your STC plan can take 4 to 8+ months! The time it takes to create your plan depends on how many questions we have for you, how many strategies we find for you (the longer the better!), and how fast you answer our team. Help us Help you by responding to our questions as quickly as possible!



Q&A TIME - WOI

2

We will email you a private link to your "WOI Sheet" (WOI = Waiting on Information). This sheet helps us track our questions, your answers, more questions, etc, etc. This will be our joint hub of information to complete your work. *If you have any troubles with the Google sheet, PLEASE let us know ASAP! **We cannot move forward with your tax plan until every single question is answered** through the multiple rounds of questions.*



FINDING EVERY PENNY OF SAVINGS!

Your STC plan can include videos, detailed backup from the IRS, professional team recommendations, implementation guides, and more! *Right now, our team is working hard to find you every penny of tax savings possible!* Your plan is written to be as user friendly as possible, written in human English and not "tax code," so you easily understand what you need to do to save all of that tax money & keep it in your pocket!



PLAN DELIVERY

4

We will send you an email with your custom Strategic Tax Coaching "STC" plan in PDF format with videos, implementation guides, calculations, backup, and all the details necessary for you to SAVE TONS OF MONEY!!



REVIEW & IMPLEMENT

It's time to review & implement! We suggest that you start with a review of your main executive summary cover letter before you really dig into all the goodies involved in your plan (reading ahead of time, then implementing, ensures that you can implement everything correctly!)

5

ONGOING SUPPORT



6

Remember! You have (3) 30 min sessions included in your plan for any questions you may have! We are available for support via your private slack channel, text messaging, zoom meetings, or telephone calls.

IN CASE YOU WANT TO CHAT?

If you have questions: [Make an appointment with our team](#)

We Love Texts! 602.362.7939

Email: info@taxgoddess.com

Go Here to [Upload](#) documents for us



Please ensure we are whitelisted so that you don't miss any important information!