



The Roz Report

SEPTEMBER/OCTOBER 2019



AUTHORIZED MEMBER 2019

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Say 'I Do' to Something Different

How Your Business Benefits From Rejecting Tradition

This past summer, our youngest daughter, Erica, got married. She and her now-husband, Ramsey, have been together for six years, and when they decided it was time to tie the knot, they wanted to do things differently. It was an incredible wedding weekend where the bride and groom found many opportunities to make the celebration their own.

The first big break from tradition was holding a cocktail hour *before* the ceremony. Erica and Ramsey were both at the party, and Erica was wearing a different dress than her wedding dress. They wanted everyone to have a chance to mingle and have fun before the ceremony. When the ceremony started, every member of the bridal party danced (instead of boringly walking) down the aisle to a different fun song.

Erica and Ramsey wrote their own vows, and after they said "I do," all the guests waved wedding streamers and blew bubbles. The couple really wanted to create a feeling of celebration at their wedding and make it an event their guests would remember forever. Rather than do things just because they were traditional and conventional things everyone does, our daughter and son-in-law made the day truly their own. In the biggest break from tradition, they combined her last name, Rozbruch, and his last name, Abdulhamid, to create a new family name: Rozmid.

One of my favorite personal touches was the father/daughter dance during the reception: Instead of playing the usual sappy song, Erica and I decided it would be more fun to play some rock 'n' roll, so I picked "Sweet Child O' Mine" by Guns N' Roses. It was great! Erica and I got to rock out together the whole time. (And it's good to know I still got moves!)

I loved every moment of this wedding. It was wonderful to see my daughter so happy and celebrating her way, and it also captured the value of doing things differently. I'd like to think that Erica got a little bit of her bold spirit from



Michael, Roslyn, Erica, Ramsey, and Danielle.

me, because my entire career has been about doing things differently than everybody else.

In order to stand out in the tax resolution business, you need to be doing things differently. **Make yourself stand out!** The following are some ways you can stand out from the crowd.

- Offer a free tax debt settlement analysis call instead of just a free consultation.
- Give people valuable information in the form of special reports or consumer awareness guides *before* they become a client, such as the "7 Secrets the IRS Doesn't Want You to Know" or the "5 Misconceptions About Tax Resolution Companies." In other words, answer questions they have swirling around in their heads.
- Make your marketing impactful. I always had fun with my marketing. When I had my firm, I did radio ads in which I would scream "BE A MAN!" at the top of my lungs. This

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FOOD FOR THOUGHT:

BY ROSLYN ROZBRUCH (AS I SEE IT)

Focus on the solution.

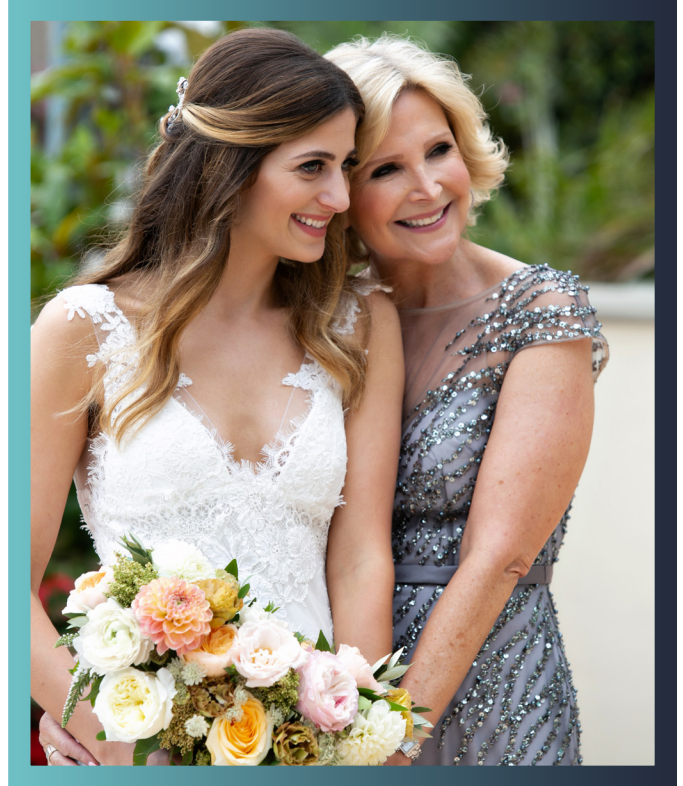
During the 18 months of Erica and me planning her wedding, even though it was a lot of fun, there was also a tornado of other problems swirling around. It's not that important to mention all the turbulent activity that happened during that time, but I will share one problem.

Right around March, my older daughter, Danielle, decided to sublet her apartment for a few months because she had a work opportunity in Joshua Tree. For those of you unfamiliar with Joshua Tree, it's located 130 miles east of Los Angeles, just outside of Palm Springs. Translation: the middle of nowhere in the desert, or, as one travel brochure says, "one million acres of desert landscape, with a population of 7,414." Danielle has been to Joshua Tree many times and has friends there. Going to stay for a few months wasn't the problem; subletting her guest house to an acquaintance was.

Without going into all of the boring details, let's just say the person who sublet my daughter's home reminded me of the main character from the movie "Gone Girl," and if you don't know that movie, then let's just say she was something out of your worst nightmare. Unfortunately, it turned into a worst-case scenario: She completely moved into Danielle's place within one week's time, and to make room for her things, she put some of Danielle's things outside and some of her other things in the trash. I sensed the subletter was not going to move out. Needless to say, it was stressful for not only my daughter but for Michael and me as well.

Things went from bad to the most awful real quick. As I tried to stay in the eye of the storm and not get sucked into the tornado of life, I listened to a podcast from Dean Graziosi. Michael and I have been fortunate to have been in one of Dean's mastermind groups for a couple of years, and we've learned so much from him and have great respect for him. On this particular podcast, Dean shared how he went fishing with his fiancée, Lisa, and son and daughter when somehow, his son accidentally got a fishhook stuck in Dean's hand. Apparently, once that hook got in, it didn't come out so easily.

Dean tried a few things, but the hook wasn't coming out. He shared that instead of getting upset and yelling at anyone or blaming his son, he decided to "focus on a solution." What could he do to get the hook out of his hand? He knew pulling at it wasn't going to get it out, and while I don't



remember exactly how he got it out, the point is that he did figure it out. What stuck with me was the simple phrase, "focus on the solution." It's so easy to get upset and blame others or hold onto the things that bother us. But if grudges were rocks, it would be a heavy load to carry if you never let them go.

After listening to Dean's podcast, I decided to do as he said. I went to Michael and shared this information, and we decided to hire an attorney to help Danielle. Lucky for us, one of our friends, Mike Zeff, is an attorney, and he's also an expert in knowing how to evict tenants who take advantage of their rental situation. A little more than two months after the nightmare began, the subletter moved out. And after a thorough cleaning, painting, and some repairing, Danielle happily moved back into her home.



We all have tornadoes in our lives at times. You can let yours sweep you away, or you can stay focused, figure out a solution, and get out of the storm.

-Roslyn Rozbruch

FROM THE PRACTICE CORNER

Former National Taxpayer Advocate, Nina Olsen, created the map below before leaving office. The map was created in hopes of helping taxpayers find their way — when actually, it reveals the absolute need for professional help and is a gift to Practitioners. This map illustrates, at a very high level, the stages of a taxpayer's journey, from getting answers to tax law questions all the way through audits, appeals, collection, and litigation. It shows the complexity of tax administration, with its connections, overlaps, and repetitions between stages. As you can see from its numerous twists and turns, the road to compliance isn't always easy to navigate.

"The Taxpayer Roadmap 2019" (which is more confusing than the New York City subway system) is supposed to

help taxpayers navigate the maze known as the Internal Revenue Service. This is a great visual to demonstrate to potential clients just how difficult it is to resolve a tax problem. Now, if a potential client says, "I think I can just do this on my own," give them a copy of the map and wish them good luck.

Get a copy of the map at www.TaxpayerAdvocate.irs.gov. I would print the map, as many of our members have, and use it in your marketing. Having this blown up and strategically placed in your lobby or conference room is a great way to remind prospects they'll get creamed if they attempt to do this on their own.

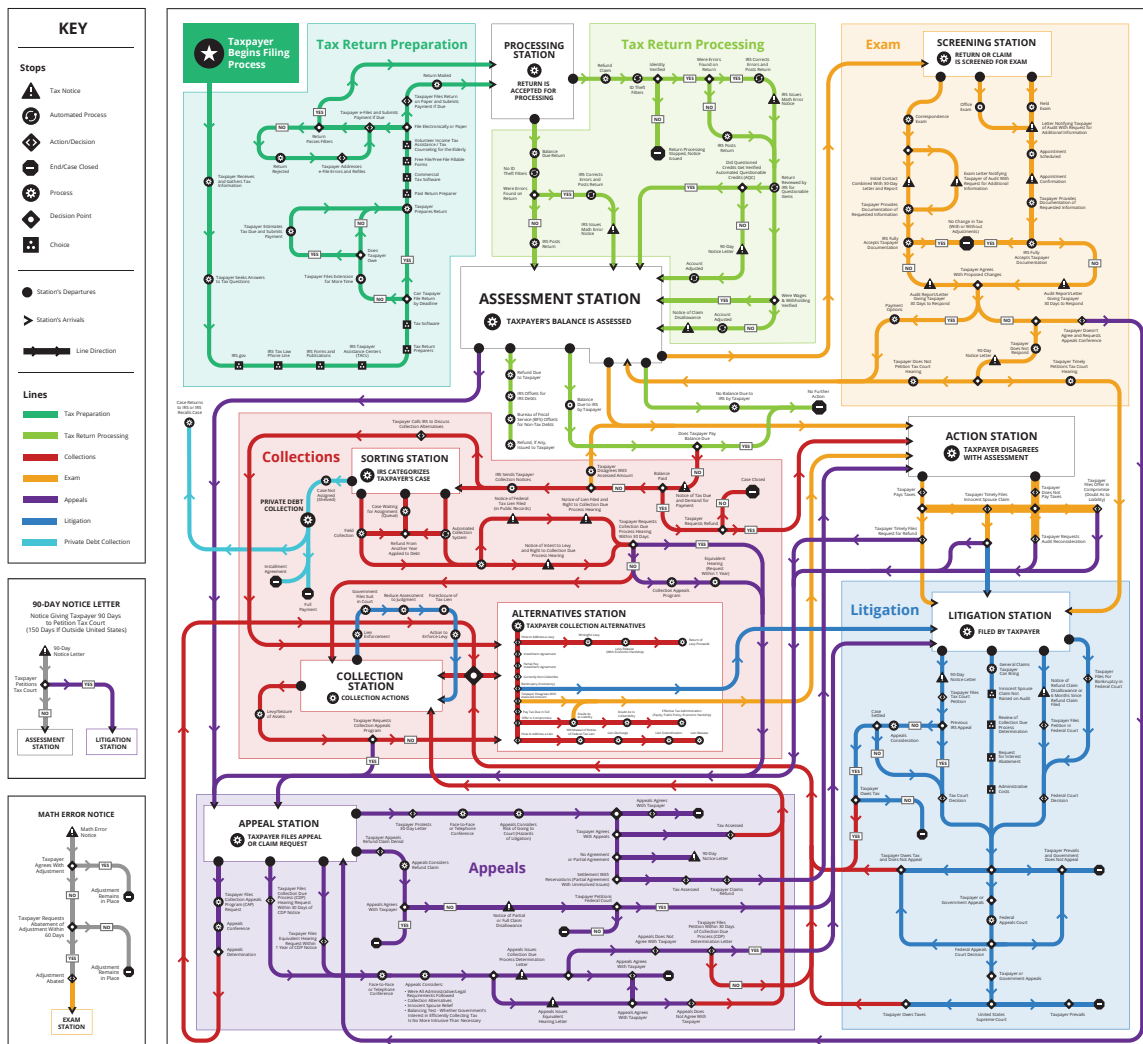
—Michael Rozbruch

The Taxpayer Roadmap 2019

An Illustration of the Modern United States Tax System

The map below illustrates, at a very high level, the stages of a taxpayer's journey, from getting answers to tax law questions, all the way through audits, appeals, collection, and litigation. It shows the complexity of tax administration, with its connections and overlaps and repetitions between stages. As you can see from its numerous twists and turns, the road to compliance isn't always easy to navigate. But we hope this map helps taxpayers find their way. A project of the Taxpayer Advocate Service.

For more information visit taxpayeradvocate.irs.gov



Member Spotlight

John Turner, CPA

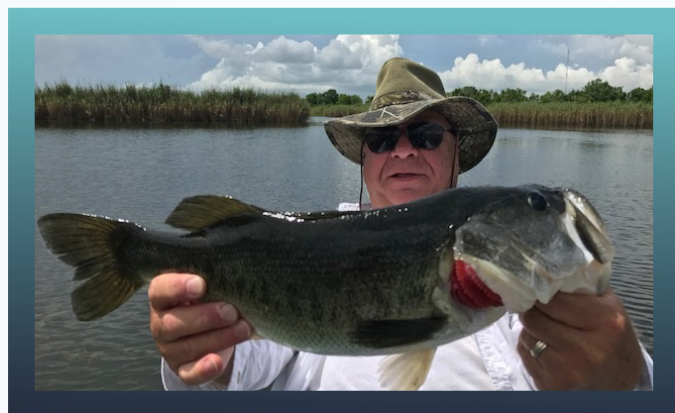
John Turner had an “aha!” moment over a year ago when he attended one of Michael’s online classes. He had been practicing public accounting since 1989 and had dabbled in tax resolution, but it wasn’t until last year that he realized the full potential of helping his clients solve their IRS problems. “On and off, I’ve helped clients with installment agreements,” John acknowledges, “but as far as tax resolution as a specific part of my business, we’ve been doing that since I attended Michael’s online class, invested in the Tax Resolution Domination System and Toolkit, and attended the Success Summit in Austin summer of 2018. Before that, any time I had something like an OIC, I would give a local tax attorney a call and send him a referral. Michael showed me that I was giving a lot of money away!”

John shares how much knowledge and confidence he has gained as a Diamond Insider’s Circle Member. “The biggest challenge was learning how to do the representation work,” he says, “but you take it one step at a time. You learn a little bit; you practice that, and then you look for the next thing you can learn.” He also appreciates the networking opportunities with fellow members at Success Summits and other live events. “One thing that struck me about this business is that most people are pretty open about sharing what’s working for them,” he says.

One success strategy John has learned from Michael and implemented is using the fee schedule and charging appropriate amounts for each service he provides. “I was way underpricing,” he admits. “I was going off of an hourly rate, and if I did a tax resolution case where the client owed the IRS \$12,000, I was getting something like \$575 — when my average tax return was \$650!”

Having a degree in marketing has served John well in obtaining new clients for tax resolution. “My first degree was in marketing,” he says. “I hated accounting when I was an undergrad and swore I’d never do it for a living. I started selling computer accounting systems, so I was cold-calling all the time, and it just wasn’t fun. But part of my training was to install the accounting systems, and I really enjoyed that aspect of it.”

Everything has come full circle for John, from marketing to accounting to marketing again. “That marketing training is now coming back to me, and I don’t know which I like the most, actually doing resolution work or doing the marketing for it, because I enjoy them both!” John does most of his marketing via radio as a guest on call-in shows about taxes. In addition to



producing great leads for his tax resolution business, he says the shows give him an opportunity to help people find answers to their tax questions.

Besides experience in marketing and accounting, John also has some experience with collections. “Back in my college days, I did debt collection for Sears and Roebuck,” he explains. “I speak Spanish, so I made calls to Hispanic people who didn’t speak English. I offered them installment agreements. If the payment was \$100 a month, I’d get what I could, say \$10 or \$25 a month.”

John liked helping people back then, and he likes helping them now. “There are a lot of charlatans out there,” he declares. “I can’t believe the number of clients who tell me someone took their money and didn’t do anything to help them.”

John is a native Texan, but his dad’s job as a mechanical engineer with an oil company moved the Turner family to Venezuela before John was 2. When they returned to Texas 10 years later, John was bilingual and happy to have friends from many different cultures. “The school I attended had children from literally all over the world,” John recalls. “I’m really thankful that I had that experience early and saw people for who they are. We all have the same struggles.”

John and his wife of 47 years have three children and nine grandchildren, and they recently welcomed a new fawn-colored puppy, Buck, into the family. In his spare time, John loves to fish for bass, and like any good fisherman, he can tell a great fish story. “My best day, I caught 46 bass that ranged anywhere from 2-1/2 to 4-1/2 pounds,” he says. “I have a witness. I caught 46. He caught 48. We both had a really good day. They were big fish, too!”

ROZ STRATEGIES

Platinum Mastermind

REGISTRATION NOW OPEN FOR 2020!

I have selected the dates for my 2020 mastermind group meetings. This will be my sixth year leading this mastermind. I'm very excited about the coming year, because the returning members in the group have been breaking through barriers and going to the next level! We have an 80% renewal rate for members in the group.

NEW FOR 2020

I've also leveled up how I lead the mastermind group. In 2020, I have included specialized trainings by experts in their industries. For example, Hugo Fernandez and Isaac Park of Just Digital, Inc., who perform all of our digital marketing campaigns, are at every mastermind meeting, personally consulting with members to improve their online client acquisition process. Parham Khorsandi, founding managing member of Victory Tax Lawyers, LLP, who used to work at my former tax resolution firm and was in charge of our "large dollar" (\$250,000) unit, will be teaching case management and advanced technical tax resolution strategies. And I will help you with your specific business challenges. I combine my boardroom-style program with a hot-seat format, with me personally leading and providing input as well as training and helping you establish your goals. And I have accountability calls with you in between meetings.

I have several openings, and registration is officially open for 2020!

I'm looking for a few "top guns" in the tax resolution industry seeking to take their business to the next level, improve it, or expand it. The dates are:

May 6, 7, and 8, 2020

Aug. 6 and 7, 2020

Dec. 3 and 4, 2020

We meet three times a year at the Hilton Universal Hotel, Los Angeles — two 2-day meetings, and one 3-day meeting. Acceptance into the group is by application process only. If you are interested in more information, please email Becky, manager of client happiness at Becky@RozStrategies.com, or go to rozstrategies.com and click on the mastermind tab.

Dedicated to your success,

-Michael Rozbruch

"Would I recommend this program? Absolutely! I made an investment into my business, and it has paid off tremendously. The mastermind program truly has made a significant financial impact on my business, and I only see it getting better and better! Thank you, Michael, for sharing your amazing secrets for success."

-Patrick R. Sheehan, attorney



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SHOUT

... continued from Cover

made a lot of people mad for a lot of different reasons, but it worked like gold. Those ads generated tens of millions of dollars.

The important thing to remember is don't be afraid to be different. Don't be afraid to stand out. If you know you have a good idea, don't worry about what your peers or colleagues are going to think about you, because they're not the ones who are going to put money in your bank account! Your goal is to connect with prospects and clients and to make sure they remember you. It doesn't matter if you're running a business or planning a wedding; the best way to be memorable is by having the courage to do things differently.

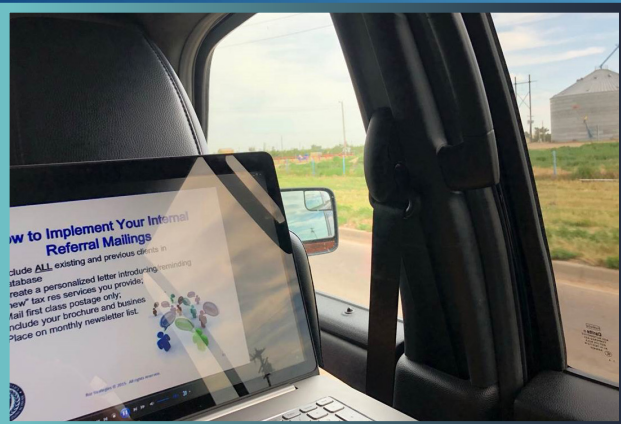
-Michael Rozbruch



Patrick Sheehan, wife Julie Miller,
and George Leddicotte



Jeff Johnston, Jeffrey Schneider, wife Ali
Schneider, Roslyn, and Len Nelms



Way to go, **Timothy Thompson**! Now this is what we call a dedicated Insider's Circle member — taking his training on the road! Thanks for sharing the picture of the desk you set up in the back seat of the car while your wife drove through the panhandle of Texas on your way to Colorado Springs.



Mastermind Members Having Fun

OUTS!



Congratulations to **Kassi Sikes**, who recently passed the third and last part of the EA exam! She's a brand-new EA!

Way to go, **Charles Montecino and Megan Ciacchia**, for being listed as No. 13 in the Best Accounting Firms list of South Jersey Biz Magazine.

Kudos to **Allan Pearlman** for getting an Innocent Spouse for his client through the IRS and New York state and saving the client \$500,000!

High-five to **Ben Butterfield, Lacey Riley, Patricia Beckwith, Dorit Dimand, Jack Burt, Katharine LaBoda, Phillip Foster, Richard Ferretti, Rev. Cedric Alexander, Victoria Hayes, Jesus Abikarram, and Edward Hamilton** for sending out their referral letters and brochures to their existing and previous database!

Other high-fives to **Keith Duke Jones and Richard Ferretti** for taking action and implementing the social media and blog posts! And to **Philip Hebner and Patricia Beckwith** for mailing out your newsletters!

Congratulations **Patrick Noone** for getting an \$1,800 fee (10% success fee) on negotiating and removing \$17,855 worth of IRS penalties on a phone call that took 30 minutes! That's what I call value pricing!

Do you have a story or picture to share with us on something you've implemented, a client you've helped with a tax problem, or anything else you'd like to share? If you do, email it to us at info@RozStrategies.com and we will give a Shout Out to you!

WELCOME, NEW AND RETURNING MEMBERS!

Robert Dotey
Tom Mallon
Nikole Nelson
Amit Chandel
John Weinberg
Dwayne Dowden
Phillip Anderson
Dmytro Arshynov
Robert Cross
Michael Giesinger
Timothy Phillips
Robert Stephanak
Mark Summers
Frances Tones
Raul Torres
Randy Watkins
Robert Forte Jr.

Trish Beckwith
Ben Butterfield
Nancy Byer Hauan
Alisa Cardinal
Angela Cooper
Bill Gunter
Bobby Hancock
Philip Hebner
Keith Jones
Latonia Raines
Stephanie Spencer
Shibu Thomas
Rodney Williams
Paul Nick
Bryan Brassell
Vincent Davis
George Egan

Happy Birthday to Our Members!

September

Thom Gearhart
Sam White
Sharon Lewis
Adela Lane
Adawn Ehmen
Stacy Sand
Ralf Reinberg
Ken Sullivan
Vicki Bott
Larry Core

October

Wendi Hall
James Randolph
Gregory McCauley Jr
Marc Berger
Deltrease Hart-Anderson
Mayumi Todd
Karina Alvarez





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IRS Terror Tale of the Month

Tax Fraud Could Land 'Aunt Becky' in the Big House

Earlier this year, the FBI uncovered a massive, nationwide college entrance admission scandal, where wealthy parents paid a man named William "Rick" Singer to get their children into top-ranked universities, such as Georgetown, Stanford, UCLA, and Yale.

The scandal made headlines across the country, both due to the audacity of the crimes and the high-profile names associated with them. A few celebrities were revealed to have used Singer's services, including Lori Loughlin, best known for her role as Aunt Becky on the sitcom "Full House." Loughlin and her husband, fashion designer Mossimo Giannulli, allegedly paid Singer a bribe of \$500,000 to ensure their daughters were accepted to the University of Southern California.



Singer's services included faking admissions scores, bribing coaches, and passing students off as athletes. To cover up these illicit activities, payments to Singer were disguised as charitable contributions to the nonprofit Key Worldwide Foundation (KWF). While KWF was registered with the IRS as a legitimate nonprofit, it's clear now that all donations and grants through

the organization were part of this scheme. Adding insult to injury, many parents who used Singer's services deducted their "donations" to KWF from their federal income taxes, committing tax fraud.

Besides cheating to get their daughters into USC, Loughlin and Giannulli opted to follow in the footsteps of other wealthy parents and deduct the bribe as a charitable contribution. Now, in addition to facing 40-year prison sentences for their alleged involvement in the admissions scandal, the couple is also being audited by the IRS. Reports claim that they will be audited for five years on their personal income taxes and that Giannulli's business will be audited for three years.

Loughlin and Giannulli pleaded not guilty to charges of fraud and money laundering after rejecting a plea deal. It's up to the court and a jury to decide their fate with those charges, but even if they are found innocent, it won't get them off the hook with the IRS. When it comes to tax fraud, the IRS always wants the money that's due, and they have no problem sending people to jail for cheating on their taxes. Aunt Becky might go from a Full House to the Big House.