

Tax Boss Course by Mary Roque

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Let's begin!

Lesson 1

How to choose a good business name:

1. Avoid hard-to-spell names.
2. Don't pick a name that could be limiting as your business grows.
3. Conduct a thorough Internet search.
4. Get the .com domain name.
5. Use a name that conveys some meaning.
6. Conduct a trademark search.
7. Conduct a Secretary of State search.
8. Assess if the name is catchy.
9. Get feedback on the name.
10. Make sure the name sounds good when said aloud.
11. Make sure you are personally happy with the name.

How to choose a good logo:

1. Understand why you need a logo
2. Define your brand identity
3. Find inspiration for your design
4. Check out the competition
5. Choose your design style
6. Find the right type of logo
7. Pay attention to color
8. Pick the right typography
9. Communicate with your designer
10. Evaluate your logo options
11. What not to do when designing a logo
12. Integrate your logo design into your brand

Purchase your business cards and/or digital cards.

Lesson 2

1. Research Business Structures
2. Determine a business structure
3. Add a business phone line:
<https://www.kall8.com/>
<https://voice.google.com/u/0/about>

Lesson 3

How to register your business:

1. Example of how to Google your Secretary of State to register an LLC: (Enter your state name here) and add "Secretary of State". For example, for Texas, Google: Texas Secretary of State.
2. Example of how to Google your county clerk to register as a DBA: (Enter your county name here) and add "county clerk's office". For example, Google: Hidalgo County clerk's office.
3. Apply for a free EIN
 - a. <https://sa.www4.irs.gov/modiein/individual/index.jsp>
4. Open a business bank account

(Note: If you would rather have someone with more experience register your business, I can help you -I offer that service. Text me to get more info (956) 422-3737.)

Start to set up your office:

List of office supplies for your desktop & desk drawers

- Computer or laptop with Internet access and necessary software such as word processing, spreadsheets, etc.
- Pens and pencils, and erasers
- Highlighters
- Permanent markers; thick and thin, black
- Scissors
- Paper clips, and paper clip holder
- Binder clips - various sizes
- Stapler, and staples
- Tape dispenser, and extra rolls of tape
- Glue sticks
- Rubber bands
- Pencil sharpener
- 3-hole punch
- Calculator
- In/Out box for paperwork
- Desk drawer organizer to keep the smaller supplies separated and organized

Paper & Stationery Supplies

- Envelopes - letter size; small and large
- Return address labels
- Stationery/thank you notes
- Stamps
- Sticky notes
- Notepads
- Printer paper in bulk
- Printer ink/toner/cartridges

Filing Supplies

- File cabinet or file box
- Manila file folders
- Hanging file folders, plus tabs

- Pocket or accordion file folders
- File labels - to add names of clients to manila folders
- 3 ring binders
- Index dividers

Other Supplies

- Calendar (desk or wall version)
- Planner
- To do list
- White board or bulletin board (plus appropriate supplies such as dry erase markers or thumbtacks)

Small List of Equipment

- Printer
- Wireless router
- Power strip/surge protector
- External hard drive - to store your client's data digitally
- Flash drive – to keep all your tax documents in digital format
- Paper shredder
- Scanner
- Label maker (optional)

Lesson 4

Create your mission statement and business plan

The mission statement answers three (or sometimes four) basic questions:

1. Whom does the organization serve?
2. What does the organization do?
3. Why does the organization do it?
4. [Optional] How does the organization do it?

Link to business plan: <https://www.sba.gov/business-guide/plan-your-business/write-your-business-plan>

Start to develop of a marketing plan

Lesson 5

1. Purchase antivirus protection for your computer/laptop:
Norton.com, Avg.com, or Google search "antivirus programs"
2. Purchase business insurance:
Hiscox.com, or Google search "business insurance"

Start to get familiarized with your tax software if you haven't already started. Continue to develop your marketing plan and execute.

Lesson 6:

Circular 230, CTEC, PTIN

Circular 230 link: <https://www.irs.gov/tax-professionals/circular-230-tax-professionals>

Lesson 7

Order flyers and marketing materials at VistaPrint.com

Promotional pens: Myron.com

Digital flyers: Canva.com

Research your tax prices and set your price list

Reminders:

1. Finish watching the self-paced tax training video
2. Continue to get familiar with the tax software
3. Continue with your marketing plan

“I want to wish you nothing but success in your tax business, remember if you ever get stuck, please let me know, you are not bothering me, if you win, I win. So, let’s get promoting, networking and talking nonstop about our new business venture. You are your best marketing tool. One more thing, it’s ok to go slow, just don’t stay stagnant. Ok, let’s do this! Let’s grow!!” -Mary

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