

# FICA Tips Tax Credit – Cold Call Script

## Preparation:

- Have your FICA Tips Tax Credit website from your Dreams back office loaded on your phone
  - Or have the manual Tax Credit Chart ready for quick reference
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## Step 1: Initial Approach

Walk into the restaurant or bar and say:

“Hi, how are you? I was hoping to speak briefly with the owner. Are they available?”

If not: “No problem—would the manager be available?”

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## Step 2: Introduction

Once speaking with the owner or manager:

“Hi, my name is \_\_\_\_\_. It’s great to meet you. I apologize for stopping by unannounced, but I wanted to share some great news with you. Have you ever heard of the FICA Tips Tax Credit?”

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## Step 3: Educate & Create Interest

(Most will say no)

“Most restaurant and bar owners haven’t heard of it.

When you pay out tips to your employees, you also pay FICA tax on those tips. What many business owners don’t realize is that a large portion of that tax can be claimed back as a credit each year.

In fact, over \$11 billion goes unclaimed annually.

We work with a company that specializes in helping businesses recover this credit.”

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## Step 4: Engage with a Quick Estimate

“Would you like to see a quick estimate of how much you may be eligible to receive?”

(Pull out your phone, open your FICA Tips Tax Credit website and scroll down to the calculator)

Ask the two key questions:

- Number of tipped employees
  - Average weekly tips per tipped employee
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### **Step 5: Close for Next Step**

“Based on your information, it looks like you may be eligible for approximately \$\_\_\_\_\_ in tax credits.

Would you like help claiming this money?” (Pause for response)

“Great—the next step is a quick 15–20 minute Zoom call with my District Manager to go over the details and next steps. What’s a good time for you?”

You can also grab a time that works best for you here: [www.TimeWithRick.com](http://www.TimeWithRick.com)”

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### **Step 6: Confirm & Set Expectation**

“Perfect—I’ll send you a quick text with the Zoom link. What’s the best phone number to reach you?”

“This will only take about 15–20 minutes.”

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### **Step 7: Wrap Up**

“I really appreciate your time today. Do you have any questions for me right now?”

“Great—please block out [date/time], and I’ll text you the link shortly.”

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### **After the Visit (Internal Follow-Up)**

Send a text to me (828.817.4596) with your name and:

- Owner/Manager name
- Business name
- Number of tipped employees
- Average weekly tips per employee