



**RIGHTWAY**  
— TAX SOLUTIONS —

&



**Tax Products Group**

**2017 PROGRAM INFORMATION**

**MONEY IN ADVANCE  
CUSTOMERS IN RETURN**

# TPG HELPS YOU GROW IN 2017



- More capital for you to start and run your business
- Larger cash advance for your clients; lower cost to you
- National Marketing Muscle
- Cash Incentives for you
- Low-priced RT options
- Convenient disbursement options
- Time saving, user-friendly processes

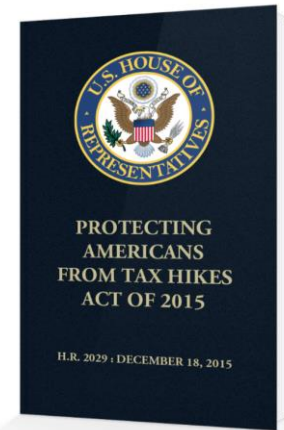
# YOUR SOLUTION FOR PATH ACT

## PATH Creates Problems

- \$100B in refunds may be delayed until Feb. 15 or later
- Up to 30+ million taxpayers impacted
- Delayed fee payment

## TPG Offers Solutions

- Cash flow help for tax pros
- Cash advance for taxpayers



# GET A HEAD START



**TPG GIVES YOU MORE  
RESOURCES TO HELP YOU  
GET SET FOR TAX SEASON**

# PRE-SEASON CASH TO FUEL GROWTH

## Up to \$18,000 for Tax Pros



- Cash available Dec. 1
- Just \$15 per mo. for every \$1,000 advanced
- *PreSeasonFUNDS* opt-in available NOW!

Advances subject to approval. Must be enrolled in standard Refund Transfer program to qualify; all discount programs offered through TPG are excluded from this program. Pre-Season Advances available only to prior TPG clients. Product terms and conditions are subject to change without notice.

# HIT THE GROUND RUNNING



**MOVE INTO TAX SEASON WITH  
CREDIT PRODUCTS TO HELP  
YOU ATTRACT & RETAIN  
CLIENTS**

# GET PAID RIGHT AWAY

## In-Season Cash Up to \$150,000 for tax pros



- *SimplyPAID* opt-in available late October
- Cash available 1<sup>st</sup> day of filing thru Feb. 28
- Free to ERO

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# PREPARER FEE ADVANCE AMOUNTS

## EXISTING CLIENTS - Amounts Available

PRODUCT VOLUME	PreSeason <b>FUNDS</b>		Simply <b>PAID</b>	TOTAL
	PRE-SEASON ADVANCE	IN-SEASON ADVANCE	IN-SEASON ADVANCE	
50 - 99			\$7,500	\$7,500
100 - 249	\$3,000		\$9,500	\$12,500
250 - 499	\$5,000		\$20,000	\$25,000
500 - 999	\$7,000		\$43,000	\$50,000
1,000 - 1,499	\$12,000		\$88,000	\$100,000
1,500+	\$18,000		\$132,000	\$150,000

## NEW CLIENTS - Amounts Available

PRODUCT VOLUME	PreSeason <b>FUNDS</b>		Simply <b>PAID</b>	TOTAL
	PRE-SEASON ADVANCE	IN-SEASON ADVANCE	IN-SEASON ADVANCE	
50 - 99			\$5,000	\$5,000
100 - 249			\$7,500	\$7,500
250 - 499			\$15,000	\$15,000
500 - 999			\$30,000	\$30,000
1,000 - 1,499			\$60,000	\$60,000
1,500+			\$100,000	\$100,000



# OFFER A CASH ADVANCE THAT ATTRACTS MORE CLIENTS

## Introducing *FastCashADVANCE*



- Offering up to \$1,000
- ERO fee is only \$25
- Advance issued by check or Green Dot card
- Single-step, fully integrated, enrollment and taxpayer application

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# BOLD & EFFECTIVE ADVERTISING



- New & Exciting designs for 2017
- Download **free** digital ads
- **Free** direct mail postcards
- **Free** national advertising campaign leverages the Green Dot marketing muscle
- 7 million customers
- Even more **free** materials shipped to your door

# IT PAYS TO OFFER THE REFUND TRANSFER

Enjoy even more ERO benefits



## **\$10 tax pro rebate**

Get \$10 for every client that receives their RT on a Green Dot Tax Time card

## **\$5,000 tax pro sweepstakes**

- Drawing a \$5,000 winner every Friday in February
- Earn 1 entry for every RT processed
- Earn a bonus entry for every Green Dot card processed

# IT PAYS TO OFFER THE REFUND TRANSFER

## Price options for your clients



- **Low Cost RT** - Taxpayers that receive their RT on a Green Dot Tax Time card pay just \$29.95
- **Regular RT price** - \$39.95
- **State RT** - \$10

# CONVENIENT DISBURSEMENTS

## Great ways for clients to receive their refund



### Green Dot Tax Time Card

- Offer the card trusted by millions
- No need to come back for a check

### Walmart Direct2Cash

- Clients get refund in cash at participating Walmart stores
- \$7 fee

# CONVENIENT DISBURSEMENTS

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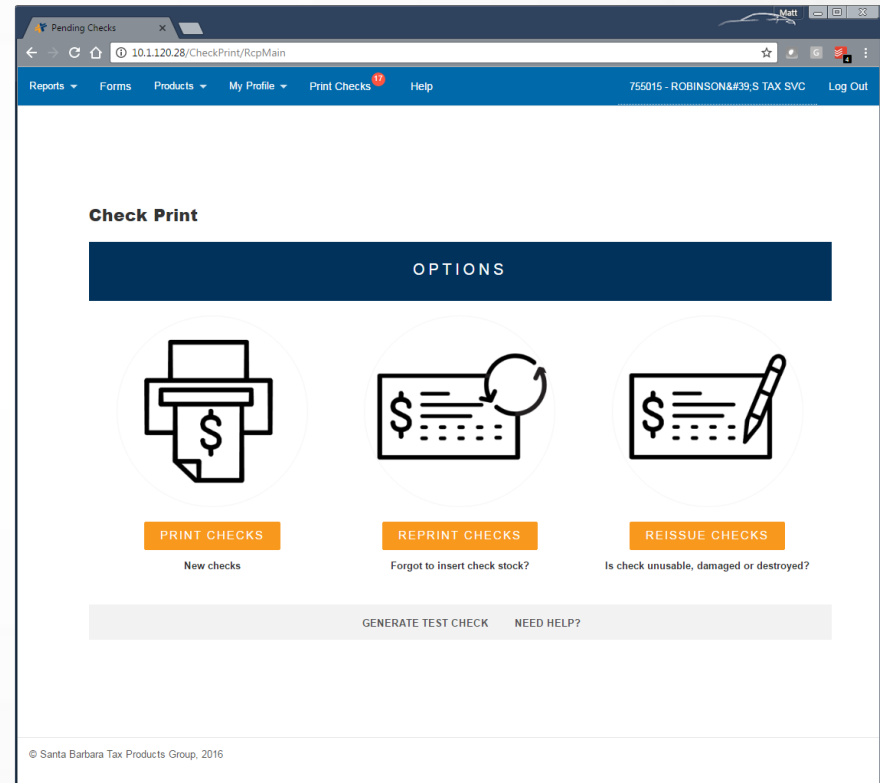
### Direct Deposit

### Cashier's checks printed from your office

- Checks up to \$7,500 cashed at participating **Walmart** stores for **\$6** or less
- Checks up to \$9,500 cashed for **\$10** or less at any **Wells Fargo**

# REMOTE CHECK PRINTING (RCP)

- Streamlined user experience; 3 clicks
- Users see only their checks filed under their PTIN
- Completely new software reengineered to eliminate prior year issues
- Enhanced transparency and reporting.



# FINISH THE SEASON STRONG

**PARTNER WITH TPG & GET THE RESOURCES YOU NEED TO GROW YOUR BUSINESS IN 2017. JOIN TPG TODAY!**



**HELPING YOU MAKE MORE MONEY AND SAVE TIME. HAVE THE MOST PROFITABLE TAX SEASON YET.**



# Q&A

1. Can new efins offer taxpayer loans with your bank?
  - Yes
2. What are taxpayer loan "deal killers" meaning if a return possesses any of these elements it is immediately DQ'd from consideration.
  - No Forms, 8888, 1310, 1040X, 1040SS, No Military
3. Prep Fee Limitations
  - No hard caps and monitored for sound business purposes
4. ERO issued debit cards - Do you offer them and if so what are the qualifications to offer them as instant issue? and associated cost.
  - All EROs can offer instant issue Green Dot Visa Debit Cards
5. ERO Pre-Season and In-Season fee advance - Qualification and Repayment schedule/methods.
  - See slide
6. Loan amounts and associated fees
  - Loan amounts = \$1,000; \$750; \$500 -- Price = \$25
7. Base RT Fees
  - \$39.95 Standard; \$29.95 on Green Dot Visa Debit; \$10 State
8. Any disbursement options other than DD, Check, and debit card
  - Walmart Direct2Cash
9. Check Cashing Agreements and Costs for said options
  - Walmart \$6 up to \$7,500; Wells Fargo \$10 up to \$9,500; Other outlets
10. Available marketing materials and fulfillment - How to
  - Free Marketing Kits, Free Downloads, Additional purchase material