

FIVE STAR TAX - THE ERC CONSULTING EXPERTS
REFERRAL PARTNER PROGRAM

Prospect/Customer Communication Templates

(Updated 06/09/2023)

SUBJECT LINE OPTIONS:

- **<NAME>, I have a strategic partner to introduce**
- **If you haven't filed your ERC, I have a trusted partner for you**
- **Taking advantage of Business Tax Refunds**
- **Business Tax Refunds we should talk about**
- **Lots of calls, but who to trust for the ERC?**
- **From one small business owner to another - I can help you with your ERC application**

GENERAL EMAIL - Have you heard of ERC? Are you looking for help?

Hello <Client Contact>

I am reaching out to let you know that I have found a partner for helping with your Employee Retention Tax Credits. This program **refunds payroll taxes that were paid on your W2 employees in 2020 and 2021**. The program has changed a lot since its initial launch and these guys know the program better than anyone. If you want to be sure if you qualify, or not, regardless of other opinions you've gotten, you should talk to Five Star.

Five Star Tax has 15+ years of experience in tax and has tax attorneys on staff to approve substantiated applications. This provides you peace of mind regarding the accuracy of your application as well as providing audit protection.

If you would like to connect on how Five Star can help, just let me know and I can set up an introduction.

GENERAL EMAIL - Five Star has all the things you look for in a trusted provider

Dear <Client Contact>,

I'm excited to let you know I have found a trusted partner who can help with submitting your Employee Retention Credits. You have likely received a number of calls from companies offering this service. I've chose Five Star Tax as a partner for the following reasons:

- Tax Attorneys Review and Sign Each Submission
- 15 Years of Tax Experience (A+ BBB)
- Audit Protection
- Applications submitted 48-72 hours

- Small-business owners helping small business owners

I'm happy to introduce you and encourage you to connect so you **don't miss out** on this limited-time program.

- Average Credit Submitted ~ \$100K
- This not a loan
- No up-front fees
- You've already earned this refund. It's time to collect it.

Let me know how you would like to move forward.

GENERAL EMAIL - This is why I am recommending Five Star

Dear <Client Contact>,

I'm reaching out to help make sure you take the time to qualify for the Employee Retention Tax Credits you are likely due.

This program is **only available for a limited time** and given your business type, you likely qualify for a tax refund on payroll taxes paid in 2020 and 2121.

I'm working with a trusted, strategic and knowledgeable partner, Five Star Tax - The ERC Consulting Experts.

Five Star is a small business of tax professionals who have been in the business for 15 years.

They are committed to helping you get your credits fast.

The average submission is \$100K per business. It is not a loan!

You will work with the same team for the entire process who will know you and your business.

Most applications are submitted in 24-48hrs. No Upfront Fees.

If you have contacted one of these larger groups that can't get your paperwork submitted, Five Star can probably get you submitted before they even call you back.

We know you're busy but a 20-minute call could mean a healthy cash infusion.

Let me know how you'd like to move forward.