



## Increasing profit with tax preparation

For more information, contact Tony Cooper  
at [tcooper@courtesytax.com](mailto:tcooper@courtesytax.com) or call him at  
+1 (706) 236-2020

# Who Is CourtesyTax?

---

- **CourtesyTax is a tax service bureau with the goal of building long-term partnerships**
- **We work with businesses and help them offer high-quality, individual tax preparation products to their customers**
- **With over 20 years of combined experience our team will help your business maximize profits and minimize potential distractions**

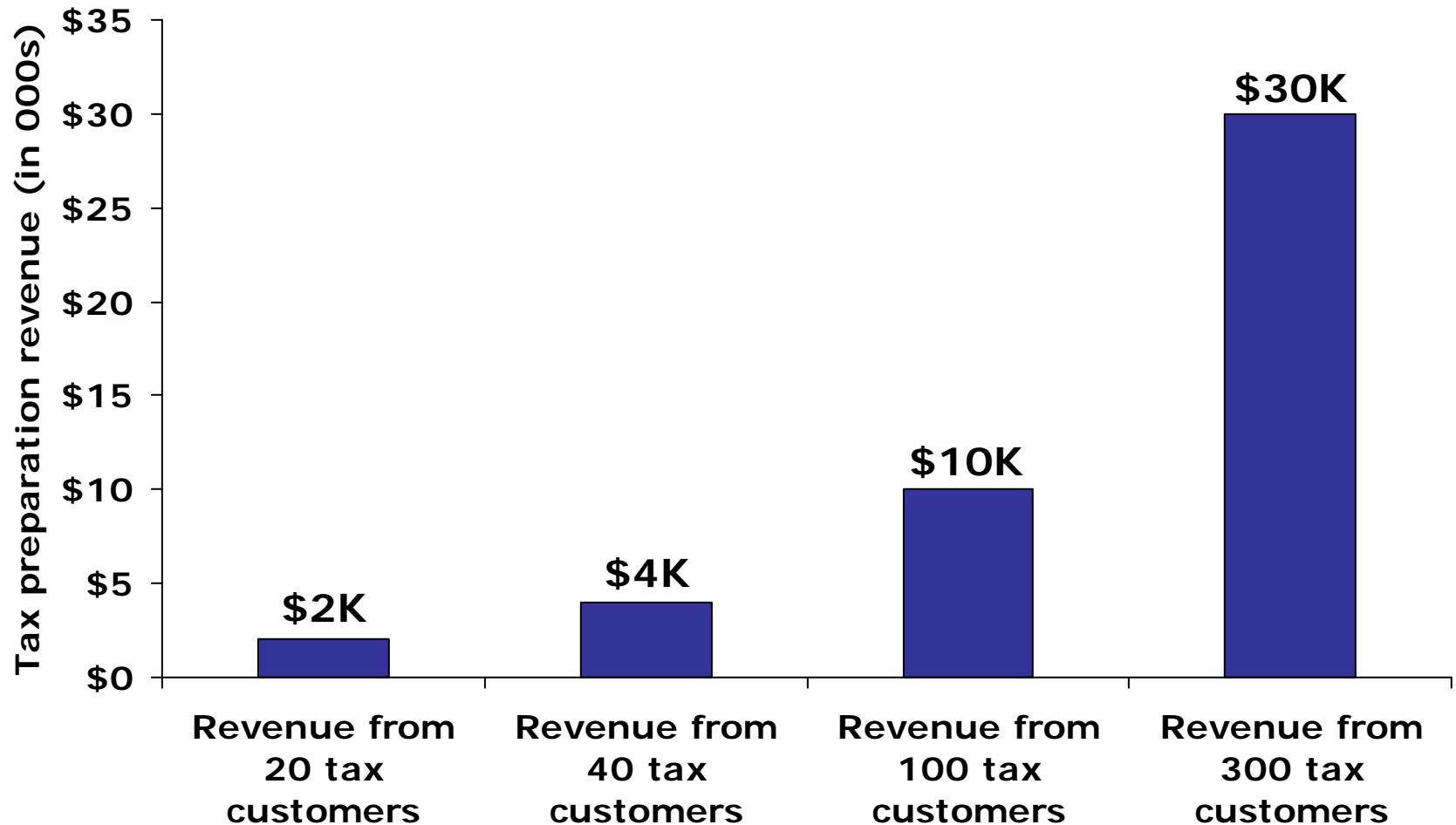
# Company overview

---

- **Tax preparation is a highly profitable business that works well with other products or as a standalone business**
  - Tax preparation can generate well over \$30,000 in fee-based revenue per location
  - Quality tax preparation will strengthen existing customer relationship and help attract new customers
- **CourtesyTax will work with your business to offer a broad range of products that maximize profits while minimizing hassle and risk**
  - We setup, support and train for a desktop software solution that allows your employees to quickly and easily prepare returns and submit them to the IRS
  - Alternatively, we provide an online software solution that transmits information to CourtesyTax so we can complete returns and submit them to the IRS for you. In this model, we assume all of the risk and reduce the work required of your employees
- **CourtesyTax believes in building long-term partnerships and is committed to providing the best service possible**
  - CourtesyTax offers proven marketing strategies and materials to help your tax business grow
  - Our team will start training your employees months before the start of tax season so they're knowledgeable and confident
  - CourtesyTax will manage the setup process including software/technology settings and registering your business with the IRS
  - Unlimited access to our customer support staff
- **We have an experienced team with the ability to make you successful**

# With minimal investment, tax preparation can generate significant fee based revenue

---



Note: This is an estimate. Fees per customer may vary significantly based on customer type and business model

# CourtesyTax works with both 'traditional' and 'non-traditional' tax preparers

---

## 'Traditional' tax preparers

- Accountants
- Independent tax preparation stores/chains

## 'Non-traditional' tax preparers

- Consumer finance companies
- Pawnbrokers
- Money transfer
- Insurance agents
- Check cashers
- Title pawn
- Pay-day lenders
- Buy here, pay here auto dealers
- Rent-to-own

# Our experience as a 'non-traditional' tax preparer helps us understand your needs

---

- **CourtesyTax is affiliated with Courtesy Finance, a 'non-traditional' tax preparer**
  - Courtesy Finance operates consumer finance stores in 3 states
  - Courtesy Finance also sells auto insurance in select locations
- **Courtesy Finance has successfully managed its own tax operations**
  - Created a marketing program that focuses on converting existing customers into tax customers and using tax preparation to attract new customers for all lines of business
  - Developed a training program that minimizes disruption to other lines of business and gives employees the confidence/skill to strengthen your customer relationships

# Our products are designed to meet a variety of needs

---

## Software products

- **TaxWise** desktop software: allows your employees to prepare returns locally
- **InterviewPlus** web-based software: transmits information to CourtesyTax so we can complete returns and submit them to the IRS for you

## Bank products

- CourtesyTax offers a full suite of bank products from multiple banks.
  - Republic Bank
  - Santa Barbara Bank

## Marketing products

- Comprehensive marketing strategy **FREE** of charge
- We will design direct mail materials and give them to you at cost
- Additional materials used in local marketing efforts

## Other products

- Audit shield
- Our **FREE**, basic training will have all your employees ready to prepare taxes. If you want an in-depth understanding of tax matters and/or tax technology, we offer additional training

# CourtesyTax provides personalized training & support to all of our partners

---

- **Our training program centers around on-site, instructor-led training sessions**
  - Training begins early so it does not conflict with busy periods in other businesses
  - Web-based training sessions are used to reinforce on-site training and answer questions
  - Each employee is required to complete 15+ practice tax returns and must pass a comprehensive exam
- **We provide unlimited access to our personal, live customer support staff**
  - Our live customer support professionals have extensive training on tax software and tax preparation
  - During busy periods, our staff is available 24 hours a day, 7 days a week



# Our team has the ability to make your tax business successful

---

## **Tony Cooper, VP of Tax Operations**

Tony is an established leader in the Tax Service Bureau industry with over 8 years of service bureau management experience, technical expertise, and training experience. Tony spent several years with CCH Small Firm Services, a leader in the Tax and Accounting industry, Tony managed CCH's high value service bureau clients, trained IRS and Military employees, and worked closely with clients in building and growing their tax preparation business. Recently, Tony has joined the CourtesyTax executive team to assist in building CourtesyTax.

## **Will Anderson, President**

Currently serves as President of Courtesy Finance, LLC, the parent company of CourtesyTax. In addition to its tax operations, Courtesy Finance operates 9 consumer finance stores located in 3 states. Prior to joining Courtesy Finance, he worked in the Dallas office of Bain & Company. Will has a bachelor's degree with a major in finance and a minor in computer science from Southern Methodist University and an MBA from Harvard Business School.

## **Bill Anderson, Advisor and Lead Investor**

More than a 30 years of experience in various aspects of income tax preparation. While at KPMG early in his career, he prepared tax returns and later served as the partner-in-charge of a satellite office tax practice. In 1991, he joined H&R Block and served as Chief Financial Officer and head of corporate development. In these roles, he was deeply involved in running the world's largest tax preparation firm. While at HRB he managed the acquisition of its TaxCut personal tax preparation software and was responsible for that products development.

CEO at Bankrate.com from its inception to its initial public offering. Subsequently, he managed two venture financed tax technology firms: freetaxprep.com, the first free online tax preparation service for individuals, and NationsTax, a service that allowed businesses to file sales tax returns online.

Most recently, Bill was CEO of Universal Tax Systems, Inc. from its acquisition by a private equity firm to its sale to Wolters Kluwer. UTS had more than 30,000 tax preparation customers who used its software to prepare income tax returns and originate tax loan products. UTS was the exclusive provider of tax preparation software to the IRS for its VITA tax preparation program and for use in its walk in assistance program.

# Contact information

---

## **Tony Cooper – VP, Tax Operations**

**Phone:** +1 (706) 236-2020

**Email:** [tcooper@courtesytax.com](mailto:tcooper@courtesytax.com)

**Address:** 2547 Redmond Circle, Ste 006  
Rome GA 30165