

7152 Knapp St NE
Ada, MI 49301
www.hbwtaxservices.com



p) 616.682.4604
f) 616.682.5338
adaoffice@pathwayfd.com

Hello and welcome to HBW Partners Tax Services (HBWPTS)!

A little about HBW:

HBWPTS is one of three HBW entities: HBW Partners, HBW Advisory Services and HBW Partners Tax Services. Our entities provide a variety of products for agents and representatives to offer to their clients. For more information about HBW and the roles of each entity, please visit the following websites:

www.hbwpartners.com

www.hbwadvisory.com

www.hbwtaxservices.com

Why taxes?

Sometimes the complexity and magnitude of taxes can make it easy to wonder 'why in the world would I want to do taxes?' As intricate as it may be, tax preparation provides a fantastic opportunity to grow your business in multiple ways. For example, most of your clients probably need to file tax returns. Instead of taking their personal information to another agency, they could bring it to someone they already know and trust. Additionally, more than 153 Million tax returns were filed in 2018. This provides a great opportunity for referrals since SO many people need this service! Also, with referrals comes the chance to discuss investments, insurance needs, and so on. When you open the door for taxes, you also open the door for many other business expansion prospects.

Why HBWPTS?

Great question... The federal tax code has over 3,700,000 words in it (for comparison, the bible has approximately 700,000 words). Yikes! We are here to help you learn the ins and outs of taxes and provide some guidance and stability as you study those 3,700,000 words. We provide your preparation software, liability insurance, and will be walking with you as you venture into the tax season to begin preparing returns and representing clients before the IRS.

How it works:

The first step is to become an Enrolled Agent (this will not only train you in taxes but also allow you to represent your clients before the IRS). You will obtain this designation independently of HBWPTS. The Enrolled Agent designation requires you to pass a series of 3 tests, each focusing on a different category of taxation and representation. Once you've been approved as an active Enrolled Agent, you can fill out the HBWPTS Application and send it to the contact information found in the footer. Upon acceptance, we will contact you to get payment for the first-year affiliation fee (this covers the insurance, tax software for the season, training, support, etc.), as well as get you trained on the tax software.

We can't wait to get started on this journey with you so please take some time to fill out the following paperwork and submit it to the contact information above. We look forward to working with you!

-The HBW Partners Tax Services Staff