

TAXCURE360 PRESENTS

Tax Resolution on Autopilot

Using AI and Automation to Never Lose Another Lead

Wednesday, May 27, 2026 | 12:00 PM Eastern

Presented by Manny Vetti | Founder, TaxCure & TaxCure360



?

Think about the prospects who didn't close

Not because they weren't interested. Because nobody stayed in front of them long enough.

One extra closed deal per month at a \$5K average fee = \$60K more per year

That is what a follow-up system does



The tax pros winning right now
aren't better at tax resolution.

They're better at
follow-up.

And follow-up is now something AI and automation can do better than any human.



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WHY LISTEN TO ME

Manny Vetti

Co-Founder, TaxCure & TaxCure360

- Nearly 20 years in tax resolution marketing
- Managed Millions in ad spend across Google, Meta & more
- Generated tens of thousands of tax resolution leads
- Operated his own tax resolution firm for 4 years
- Co-Founded TaxCure to help local pros compete online
- Built TaxCure360 to solve the lead leakage problem



The 5 Things That Close More Clients

01 Speed to Lead

The first firm to respond wins. How fast you get back to a new inquiry determines whether you ever get the conversation.

02 The Follow-Up Sequence

Most prospects need multiple touchpoints before they are ready to move. Following up consistently and long enough is what separates firms that close from firms that wonder why leads go quiet.

03 No-Show Recovery

A missed appointment is not a lost client. It is a timing problem. Having a system to bring them back is the difference between a wasted slot and a future client.

04 Engagement Letter Chase

The consultation went well. The letter went out. Now what? Staying in front of that prospect consistently until they sign is one of the highest-impact things a firm can do.

05 The Long Game

Prospects who are not ready today will be ready eventually. Prior clients will need you again. Staying visible and top of mind over months and years is how you capture that revenue when the timing is right.

Your clients are different

01

A notice arrives. The CP14. Fear kicks in. They search for help and reach out to two or three firms.

02

The IRS goes quiet. No levy. No new notices. The fear fades and life gets in the way.

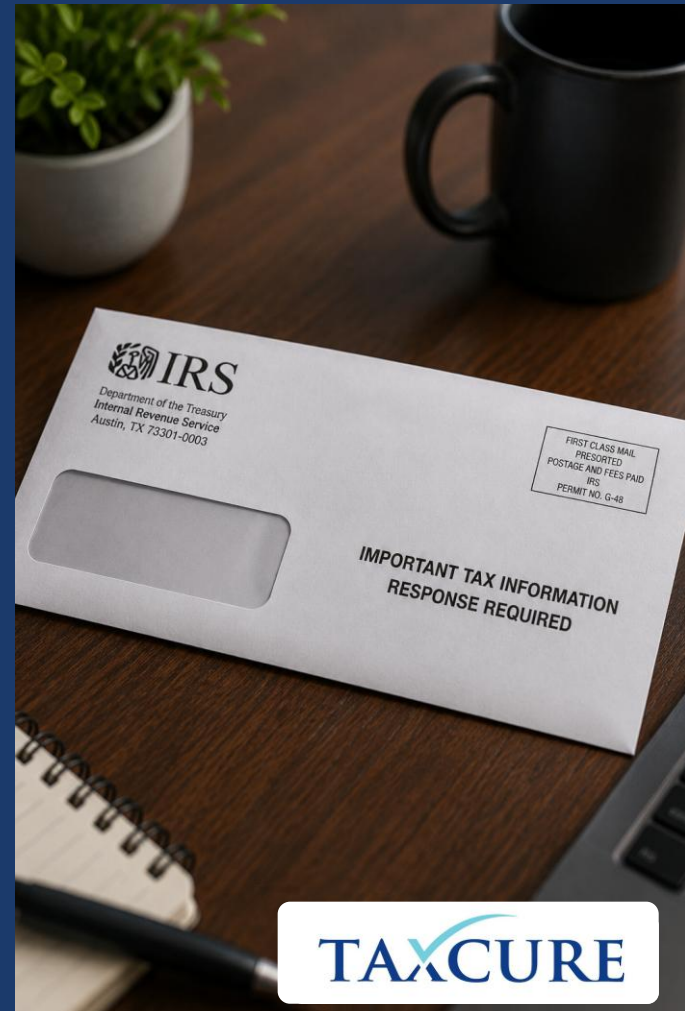
03

Your follow-up goes unanswered. After a few attempts you move on and mark them dead.

04

The LT11 arrives. A levy is coming. Now they are ready to hire someone TODAY.

The question is: do they remember you?



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Where leads are getting lost

Never answered

Lead came in but you could not get them on the phone in time

Ghosted after consult

Great consultation, engagement letter sent, then complete silence

No-show

Appointment booked, never showed up, no follow-up system to recover it

Forgot about you

Liked you but procrastinated and hired someone else when they were finally ready

Most firms have no automated system for any of these scenarios.



The leads are the hard part.

You already have them. The question is what happens after.

Large national firms pay 150 to 500 per lead because they know their follow-up system will convert them. Most small firms lose money chasing similar leads because they let them go after 2 or 3 attempts.

What top firms do

after a lead comes in

- Respond in minutes automatically
- Follow up consistently for months
- Recover every no-show automatically
- Chase every unsigned engagement letter
- Keep cold leads warm for up to 2 years

What most small firms do instead

- Follow up manually 2-3 times
- Mark them dead after a week or two
- No-shows disappear with no recovery
- Engagement letters sit unsigned
- Cold leads are never heard from again

The difference is not the lead. It is what happens after.

The answer is not working harder.

It is building a system that never stops.

Here are the 5 automations that do exactly that.

Speed to Lead

Respond in under 10 minutes, automatically

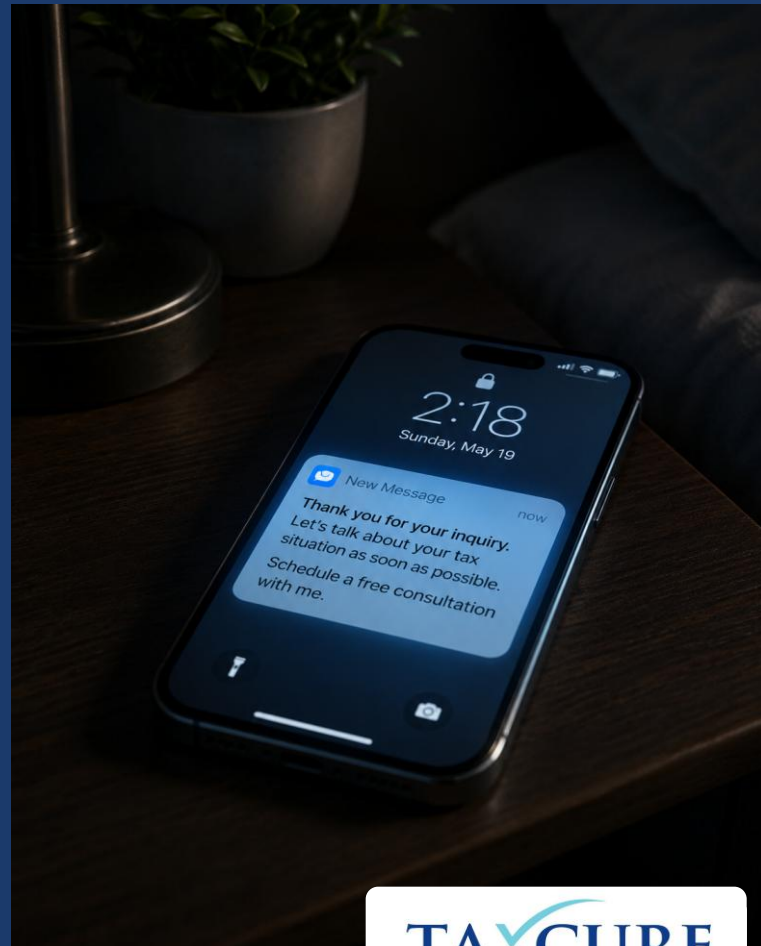
WITHOUT THIS:

Lead submits at 11pm. You see it at 9am. They already hired someone else.

WITH THIS:

- Lead submits — instantly tagged in the system
- 10 minutes later: automated email AND SMS fire simultaneously
- Pushes them to schedule a consultation right now
- Happens at 2am, on Sunday, on holidays — without anyone in the office

IMPACT: Responding in first 5 to 10 minutes increases close rate up to 90%. 80% of prospects move forward with the first company to respond



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The Follow-Up Sequence

Most firms stop too early. Here is what a proper sequence looks like.

Studies show 80% of sales happen after the 5th contact. Yet most firms follow up 2 or 3 times and stop. The gap between where you stop and where the deal closes is exactly where you are losing clients.

HOW A SEQUENCE SHOULD WORK:

Day 1

Respond immediately. Email and text. Get them scheduled while interest is highest.

Days 2-7

Follow up consistently. Address their situation, normalize their hesitation, build trust.

Days 8-14

Stay educational. Why acting sooner matters. What happens if they wait. No pressure.

Days 15+

Gentle check-ins. Keep the door open. When they are ready, you are the first call they make.

Day 22+

If still no response, move to long-term nurture. Never delete the contact. Timing will change.



No-Show Recovery

Get cancelled appointments back on the calendar automatically

WITHOUT THIS:

Prospect cancels or no-shows. You make one attempt to reschedule. Nothing. They are gone.

WITH THIS:

5 min

Email fires: Looks like we missed each other

1 hr

SMS follow-up with reschedule link

24 hrs

Email 2: Still want to talk through your situation?

48 hrs

SMS 2: Light check-in

Day 3

Internal call task assigned to staff

Day 5

Final open door email, then moves to long-term nurture



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Engagement Letter Chase

The deal is not dead. It is just not signed yet.

This prospect had a consultation. They were interested enough to hear your pitch. That interest does not disappear in two weeks. Life just gets in the way.

Most firms stop after 2-3 attempts

One email, maybe a call, another email. Then silence. Most firms move on within a week or two and never follow up again.

The reality: decisions take time

Tax resolution is a big financial and emotional decision. Prospects need time to process, talk to a spouse, sort out finances. Many come back 2 to 6 months later ready to move forward.

Whoever stays in front of them gets the deal

If you stopped following up and a competitor did not, the deal goes to them. Not because they were better. Because they were still there.

Real result: One TaxCure member generated 20K in a single month reactivating contacts who had gone quiet.



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The Long Game

Leads that never converted are not lost. They are waiting.

Most prospects did not hire a competitor. They just decided the IRS was not urgent enough yet. When the urgency comes back — and it always does — they will call whoever they remember.

Stay top of mind

Consistent, helpful touchpoints over weeks and months keep your name in front of them without feeling like a sales pitch.

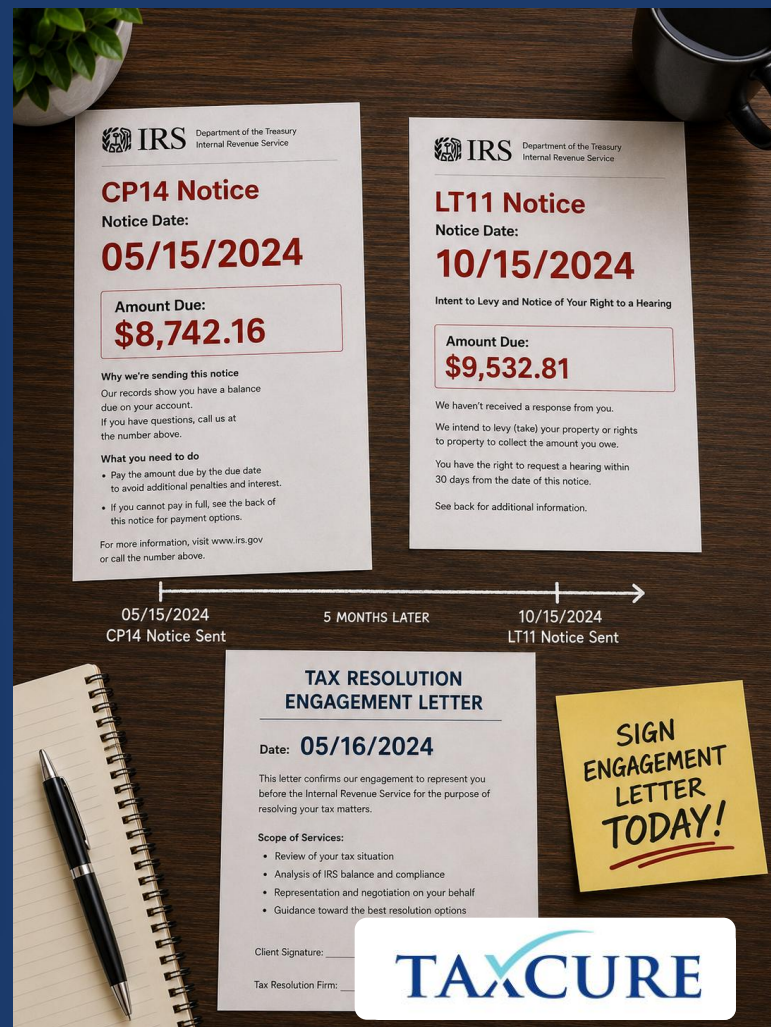
Send content that is relevant to where they are

IRS notice explanations, how penalties grow over time, what happens when letters go unanswered. Educational content that builds trust.

Be patient — the trigger always comes

The CP14 turned into an LT11. A new notice arrived. Their situation changed. When it does, the firm they remember gets the call.

They did not say no. They said not yet.



The Long Game

Your best future client already knows your name.

Prior clients are the most valuable contacts in your database. They trust you, already experienced your work, and are highly likely to need you again.

Installment agreements default

Life changes. Income changes. Clients miss payments and fall out of compliance even after you resolved their case.

Offers in compromise fall apart

OIC terms require staying current for years. Many clients slip up, owe again, and need help all over again.

They owe again the next year

Clients ignore withholding advice, skip estimated tax payments, and end up right back where they started.

New business or life changes create new problems

A new business, a new job, a divorce — any of these can trigger a fresh tax issue. You want to be the first call.

What to send them:

- Tips for staying current and avoiding new balances
- Withholding and estimated tax reminders
- What to do if a new IRS notice arrives
- How to protect what you already resolved
- Updates on IRS enforcement and policy changes

Your best future client already knows your name. The question is whether they remember it.

AI Voice Agents

Your practice is open 24/7. Even when you are not.

AI voice agents have evolved far beyond basic phone trees. They understand natural conversation, follow your exact intake process, and handle calls the way a trained staff member would — at any hour, without fail.

After-hours call handling

A prospect calls at 9pm on a Sunday. The AI answers, has a real conversation, qualifies the lead, and books them on your calendar before you wake up.

Qualifies leads intelligently

The AI understands the nature of the tax problem, how urgent it is, and whether the prospect is a strong candidate — before the call ever reaches you.

Hot transfer for motivated prospects

If a prospect is highly qualified and ready to move right now, the AI can ring you immediately and connect the call in real time.

Replaces the after-hours call center

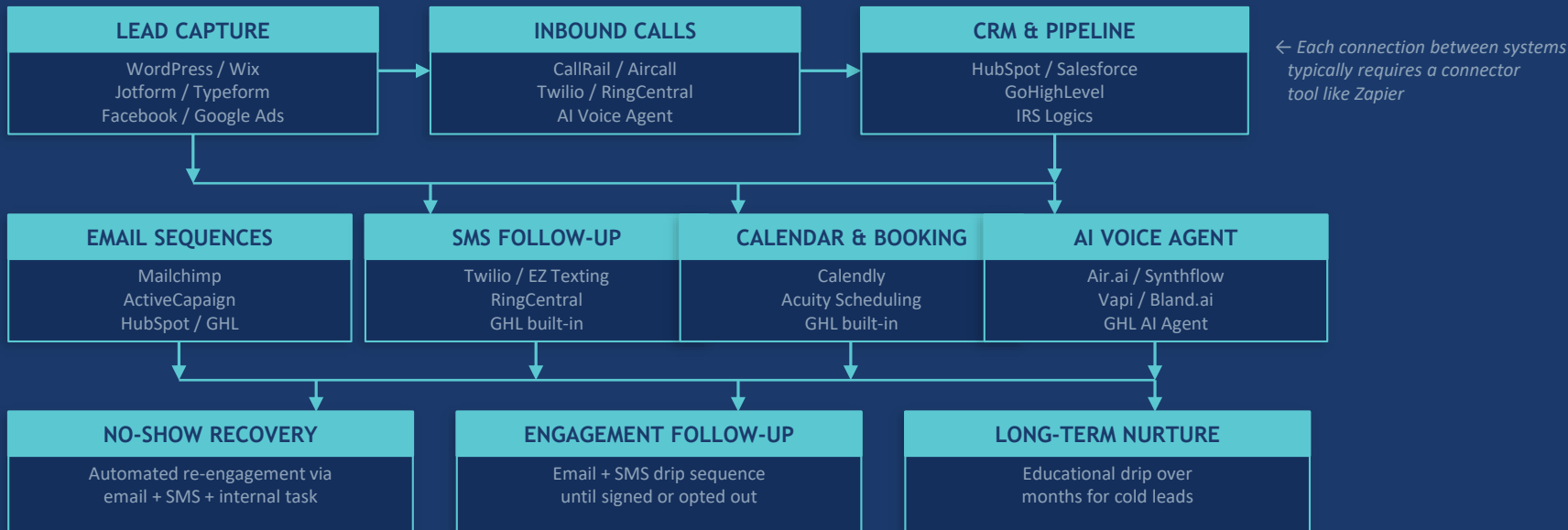
Call centers get your script wrong, lack context, and cost a fortune. An AI agent knows your business, never has a bad day, and scales without added cost.

This is where AI and automation work together — automation handles the follow-up, AI handles the conversation.



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Building it yourself looks like this.



Every arrow between functions is a potential integration point. When using separate tools, each connection requires setup, maintenance, and ongoing cost — and every connection is a potential failure point. This is the real complexity of building this system yourself.

OR YOU COULD USE ONE PLATFORM THAT DOES IT ALL

How the all-in-one platforms compare

Platform	What It Covers	Monthly Cost	Tax Resolution Ready	Setup Time
HubSpot Professional	CRM, email automation, landing pages. SMS requires separate add-on. No native phone system.	~800-1,200/mo	No	Weeks
Salesforce	CRM and pipeline management. Most automation and communication tools require add-ons or integrations.	~600-1,500/mo	No	Months
GoHighLevel (GHL)	CRM, email, SMS, phone, funnels, automation, calendar — true all-in-one. Setup from scratch required.	~97-297/mo	No	Months
TaxCure360 (Built on GHL)	Everything GHL has, with tax resolution workflows pre-built. Industry-specific support included.	99-149/mo	Yes	Days

** Pricing shown is approximate and varies based on number of users, contacts, and add-ons selected. Verify current pricing directly with each vendor.*

TaxCure360 is built on GoHighLevel — at 99 (for TaxCure Pro Members) to 149 per month you get all of GHL's power with tax resolution workflows already built in and support from people who know this industry.



We built the system we wished existed.

There are companies that train you on how to do tax resolution. Others that help you manage cases once you have clients. We focus on one specific problem — helping you get new clients in the door and convert them.

01

TaxCure Basic

Get Found

Directory listing, reviews, and online visibility. Help taxpayers find you when they are searching for help.



02

TaxCure Pro

Get Leads

Enhanced visibility and leads delivered directly to your phone and email. Connect with motivated taxpayers in your area.



03

TaxCure360

Get Clients

The automation and CRM layer that takes every lead — from TaxCure, Google, referrals, or anywhere else — and converts them into signed clients automatically.

TaxCure Pro leads flow directly into TaxCure360 automatically. And TaxCure360 works equally well with Google, referrals, Facebook, or any other lead source you use.



AND WE DID NOT EVEN COVER EVERYTHING

Everything pre-built. Everything ready to activate.

Covered in today's webinar

- Speed to lead — 10-minute automated response
- 22-day new lead follow-up sequence
- No-show and cancellation recovery
- Engagement letter chase — 120 days
- Long-term nurture for cold leads
- AI voice agent for inbound calls

Also included — and ready to go

- White paper delivery and 20-email drip sequence
- Appointment confirmation and 5-touch reminders
- Missed call text-back — instant lead capture
- AI conversational booking widget for your website
- Automated pipeline stage management
- Reputation management and review requests
- Social media content planner
- QR code lead capture

TaxCure360 is continuously evolving. As we get feedback from tax pros we keep building. The price will only go up over time — right now it is 99 or 149 per month.



THE COST SAVINGS ALONE MAKE THIS A NO-BRAINER

What you would pay for all of this separately

CRM and Pipeline Management	99/mo	Booking and Appointments	29/mo
Unlimited Sales Funnels	297/mo	Workflow Automations	169/mo
Website Builder	29/mo	Call Tracking	49/mo
Surveys and Forms	49/mo	Reputation Management	159/mo
Email Marketing and Sequences	99/mo	Tracking and Analytics	299/mo
2-Way SMS Marketing	99/mo	Document Signing	47/mo

All of these tools separately:

~1,600+ per month

vs

TaxCure360:

99-149/mo

* Individual tool pricing is approximate and based on publicly available rates. Actual costs vary by plan and usage.



BUILT SPECIFICALLY FOR TAX RESOLUTION PROFESSIONALS

Get Started with TaxCure360

Built on GoHighLevel — with 20 years of tax resolution expertise pre-loaded. You could buy GHL at 97/mo and spend months building this yourself. Or start in days with TaxCure360.

Standalone

149

/month

- All workflows and automations pre-built
- AI voice agent and conversational widget
- Full CRM, phone, SMS, calendar, funnels
- Onboarding, training, and ongoing support
- Connect any lead source — not just TaxCure

BEST VALUE

TaxCure Pro Member

99

/month — exclusive Pro member rate

- Everything in Standalone
- TaxCure Pro lead integration included
- Discounted rate locked in forever
- First access to new automations as built
- Price increases as platform grows — lock in now

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Let us address a few things

I already have a CRM

Does it have any of this built specifically for tax resolution? Or are you building it from scratch yourself? Most people use less than 10% of their current CRM.

I am not tech savvy enough

That is exactly the point. You do not set this up. We do. Onboarding, training videos, and support are all included.

Is this just GoHighLevel?

Yes, it is built on GHL. You could buy GHL for 97+/mo and spend 8 months building this. What you are paying for is 20 years of tax resolution expertise already built in.

I do not have enough leads to justify this

You probably have more contacts in your email or files than you think. We helped one member generate 20K in one month from contacts they had already written off.

YOUR NEXT STEP



More clients. Less chasing.

*Speed to lead. Long-term nurture. No-show recovery. Engagement follow-up. AI voice. White paper drip. Appointment reminders. Reputation management.
And more — all pre-built.*

Not a Pro Member Yet

Go to taxcure360.com and select the Standalone plan to get started. Once you are a TaxCure Pro member you can switch to the discounted rate at any time.

taxcure360.com

Select Standalone plan at checkout

Already a Pro Member

Go to taxcure360.com and enter the email address associated with your TaxCure Pro account at checkout. Your discounted rate of 99/mo will be applied automatically.

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Enter your TaxCure Pro email for the 99/mo rate

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