

School of Tax Strategy Monthly Coaching Series Frequently Asked Questions

What is the *School of Tax Strategy Monthly Coaching Series*?

In Tom's 30 years of coaching clients to create permanent tax savings, he knows the key behind every successful tax strategy is monthly coaching. Creating and maintaining a tax strategy is a monthly process, and as with any program, the best results come with an experienced and proven coach to lead the way. The *School of Tax Strategy Monthly Coaching Series* takes the same tax strategies Tom uses with his clients and breaks them into monthly sessions. The sessions turn the tax strategies into understandable pieces and provide a step-by-step guide on how to implement them into your own tax strategy.

What is included in the *School of Tax Strategy Monthly Coaching Series*?

The *School of Tax Strategy Monthly Coaching Series* is packed with tools and resources so you can create a customized tax strategy and *actually* create permanent tax savings. The following tools and resources are included:

- **Ask Tom.** Let Tom be your personal tax coach. You can ask Tom your questions 24/7 via a special link provided on the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account.
- **Monthly Tax Coaching Teleconference.** Learn new strategies to create permanent tax savings and ask Tom your specific questions.
- **Online Access.** 24/7 access to your session materials and information about your monthly coaching in your online account at www.ProVisionWealth.com
- **New Session Every Month.** Each month, you receive a course session focused on a topic - of your choice! The materials in each session include:
 - **Audio CD** with Tom guiding you through the key concepts and strategies of the session topic
 - **Notebook** designed specifically for the session topic highlighting the key points and concepts
 - **Session Video DVD** that combines the Notebook and the Audio CD into one presentation
 - **Live Coaching Video DVD** with Tom answering tax questions from a live audience.
 - **Workbook** with the step-by-step process to implement the strategies in the session
 - **Tom's E-Coaching** specifically designed for each session to guide you through the session
 - **Quick Start Guide** that directs you on how and where to start with the materials.
 - **Secrets, Tricks and Tips** on how to apply the concepts to your tax strategy
 - **Recording of Coaching Teleconference** focused on the specific topic

How do I make my session selection each month?

Send us an email to let us know your session selection. Specific instructions are provided on the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account.

Can I select the tax session I want each month?

Yes! Each month you select the tax or wealth session of your choice.

Do I have to make a selection each month?

No, we understand that sometimes life gets busy! If you don't select a specific session, you'll automatically receive the designated tax session for that month. You'll want to make sure the designated monthly tax session is not a session you previously selected.

When do I make my session selection each month?

Send us an email before midnight on the 15th of the month to let us know your session selection. Specific instructions are provided on the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account. If we do not hear from you by the 15th, we will automatically send you the designated session for the month. Be sure to sign up for the email updates so you receive email reminders about making your monthly session selection. Sign up on the online product page in your online account.

How do I know what the designated monthly tax session is?

The designated monthly tax session is published on the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account. This information is also emailed to you if you are signed up to receive email updates about your monthly tax coaching.

How is the designated monthly tax session determined?

Tom hand selects the session each month based on questions submitted, current issues and your feedback. You always have the option to select a different session than the designated monthly session.

What are the tax session topics?

The session topics are all focused on creating, implementing and maintaining a tax strategy to create permanent tax savings. The specific topics range from entity selection, to estate tax planning, to maximizing your tax benefits from real estate, to bookkeeping. For a list of sessions, [click here](#).

How many different sessions are there?

There are 25 tax sessions ([click here for the complete list](#)) and 12 wealth sessions ([click here for the complete list](#)). You have the option each month to select a tax session or a wealth session.

When do I receive my session materials each month?

Your session materials are available online and your hard copies shipped by the 20th of each month. You will be contacted if there are any delays. Typically, you will have online access prior to receiving your hard copy.

What is included in the hard copy session materials?

Each session includes the following hard copy materials: Audio CD, Session Video DVD, Live Coaching Video DVD and Toolkit CD. The Toolkit CD contains the Quick Start Guide, Notebook, Workbook, Tom's Secrets, Tricks and Other Tips, and copies of the e-coaching. All of these materials are also available in your online account.

What if my discs don't work?

The Audio CD and Video DVD are designed to work with most CD and DVD players. The Toolkit CD is designed to work with most personal computer CD players. If your discs are not compatible with your equipment, remember that you can find all of your materials on your online page for the session.

How do I use the Toolkit CD?

If your session materials include a Toolkit CD, it is designed to work with most personal computer CD players. When you insert the Toolkit CD into your personal computer CD player, the menu of options should display automatically. If the menu does not automatically appear, then you can manually open the menu by opening the file ending with ".exe". This is an application file located on the Toolkit CD.

What is the best way to make my way through the materials?

First, start with the Quick Start Guide as you begin each session and it will point you in the direction you need to go to make your way through the materials. *Second*, sign up for Tom's e-coaching for the session you are currently working through. Tom's e-coaching provides specific assignments to guide you through the materials and break each session into manageable pieces that you can apply to your tax strategy.

Is Tom's e-coaching the same as the email updates?

No, these are different. The email updates keep you informed about your monthly tax coaching series. You'll want to make sure to keep this active as long as you are a current subscriber. Tom's e-coaching is designed for each specific monthly session. As you start a new session, sign up for Tom's e-coaching for that session.

How do I sign up for Tom's e-coaching?

To sign up for Tom's e-coaching, complete the fields on the online page in your online account for the session you are starting and submit your request. After you submit your request, you will receive an email to confirm your request to Tom's e-coaching. Be sure to confirm your request by following the instructions in that email. If you don't receive your first e-coaching email within 24 hours, please contact us for assistance at CS@ProVisionWealth.com or 866.467.5809.

Once I begin working through the materials, who can I contact if I have a question?

If you have a question about a concept or strategy presented in the materials, be sure to Ask Tom your question by submitting it through the link provided on the online page for that session. If you have a question about what is included in your materials or trouble accessing your materials, please contact us for assistance at CS@ProVisionWealth.com or 866.467.5809.

What is the difference between the monthly tax coaching series and the monthly wealth coaching series?

The two series both include a monthly teleconference and a monthly session selection. The tax series is focused on tax strategies while the wealth series is focus on wealth strategies. If you are a current subscriber to one of the series, you can add the other series at a special rate. For details, check the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account.

When is my first monthly tax coaching teleconference?

The monthly tax coaching teleconferences are typically within 2 to 4 weeks of your purchase. For the specific date, check the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account.

What if I am unable to attend one or more of the monthly tax coaching teleconferences?

Each of the monthly tax coaching teleconferences is recorded and a playback is provided to you within 1 week of the live date. The playback link is provided on the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account. You can also receive an email with the playback link by signing up for email reminders about your monthly tax coaching (see FAQ below).

Can I add the monthly wealth coaching teleconference?

The most successful students choose to add the monthly wealth coaching teleconferences. Tom makes it really easy by offering an unbelievable special rate: \$10 per month to add the wealth teleconference! This rate is only available to those currently enrolled in *School of Tax Strategy Monthly Coaching Series*! To order, go to your online account and view the online product page for *School of Tax Strategy Monthly Coaching Series*.

How does Tom answer my questions?

You submit your questions to Tom 24/7 through a special online page. Tom answers your questions in his blog. Links to the submission page and Tom's blog are provided on the online product page and in the email updates.

Can I receive email reminders about my monthly tax coaching series?

Yes! You can request email reminders by completing the form (your name and email address) provided on the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account.

How do I access the online page for *School of Tax Strategy Monthly Coaching Series*?

Go to www.ProVisionWealth.com and select the Client Login tab. Enter your username and password. Your username is your email address. If your password was set up by ProVision, it is your last name in all lowercase letters. Once logged in, select "View Orders" from the left navigation menu. You will see *School of Tax Strategy Monthly Coaching Series* listed in the product section. Click on the magnifying glass and then select view details.

What other resources does ProVision have that might help me with my tax strategy?

ProVision is committed to providing freedom through knowledge. Be sure to visit our website at www.ProVisionWealth.com, including Wealth Strategy U – ProVision's online financial education resource. Plus, visit our education site at www.WealthStrategyUProducts.com.

What is the best way to take full advantage of *School of Tax Strategy Monthly Coaching Series*?

Here are a few tips:

- **Participate in the monthly coaching teleconference**

Block off an hour each month to focus on your tax strategy. Spend this hour learning real-life tax strategies shared during the teleconference. If you are unable to make the live teleconference, a playback link is posted on the online product page in your online account within 1 week of the live teleconference (and emailed to you if you have signed up to receive email updates).

- **Start each session with the Quick Start Guide**

Start each of your monthly session selections with the Quick Start Guide. Tom created a guide for each session to give you a step-by-step action plan to apply the concepts to your specific situation. The Quick Start Guide in each session also provides instructions for signing up for Tom's E-Coaching for that specific session.

- **Ask Tom your questions**

Take the time to ask any question you have about your specific tax situation to one of the foremost experts in tax, business and wealth strategies! And what about all those questions you don't know to ask? How amazing to listen to other people in your same situation ask the questions! To ask Tom your question, use the link provided on the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account. You can also ask Tom your questions during the live tax coaching teleconference each month.

- **Sign up to receive email updates**

Stay up-to-date on your monthly coaching by submitting your name and email address in the fields provided on the online product page for *School of Tax Strategy Monthly Coaching Series* in your online account.

What do I do if my login email address and password are not working?

Try the "Forgot Password" link. You will be prompted to answer your secret question. If this does not work, please contact us for assistance at CS@ProVisionWealth.com or 866.467.5809.

Who do I contact if my email address changes?

Contact us with your new email address at CS@ProVisionWealth.com or 866.467.5809. Your email address needs to be updated in two places. First, we will update your ProVisionWealth.com account and notify you once the change has been made. Once the change is made, you must use your new email address to login to your ProVisionWealth.com account. Second, your email address must be updated so you continue to receive your email updates. You can manage the email address these emails are sent to by clicking on the link at the bottom of any of the emails you have previously received.

When is my credit card billed?

Your credit card is charged on the 6th of the month. You will receive a receipt via email when your credit card is charged.

How do I cancel?

Contact us at CS@ProVisionWealth.com or 866.467.5809 to cancel your monthly tax coaching. Please make sure you receive confirmation from ProVision that your cancellation request has been received. Cancellations must be received by the 5th of the month to avoid the recurring billing on the 6th of the month. Your access to this online product page for *School of Tax Strategy Monthly Coaching Series* will be removed from your account upon receipt of your cancellation request.