

Refund**TRANSFER**

A QUICK SCRIPT ON HOW TO TALK TO YOUR CUSTOMERS

ABOUT

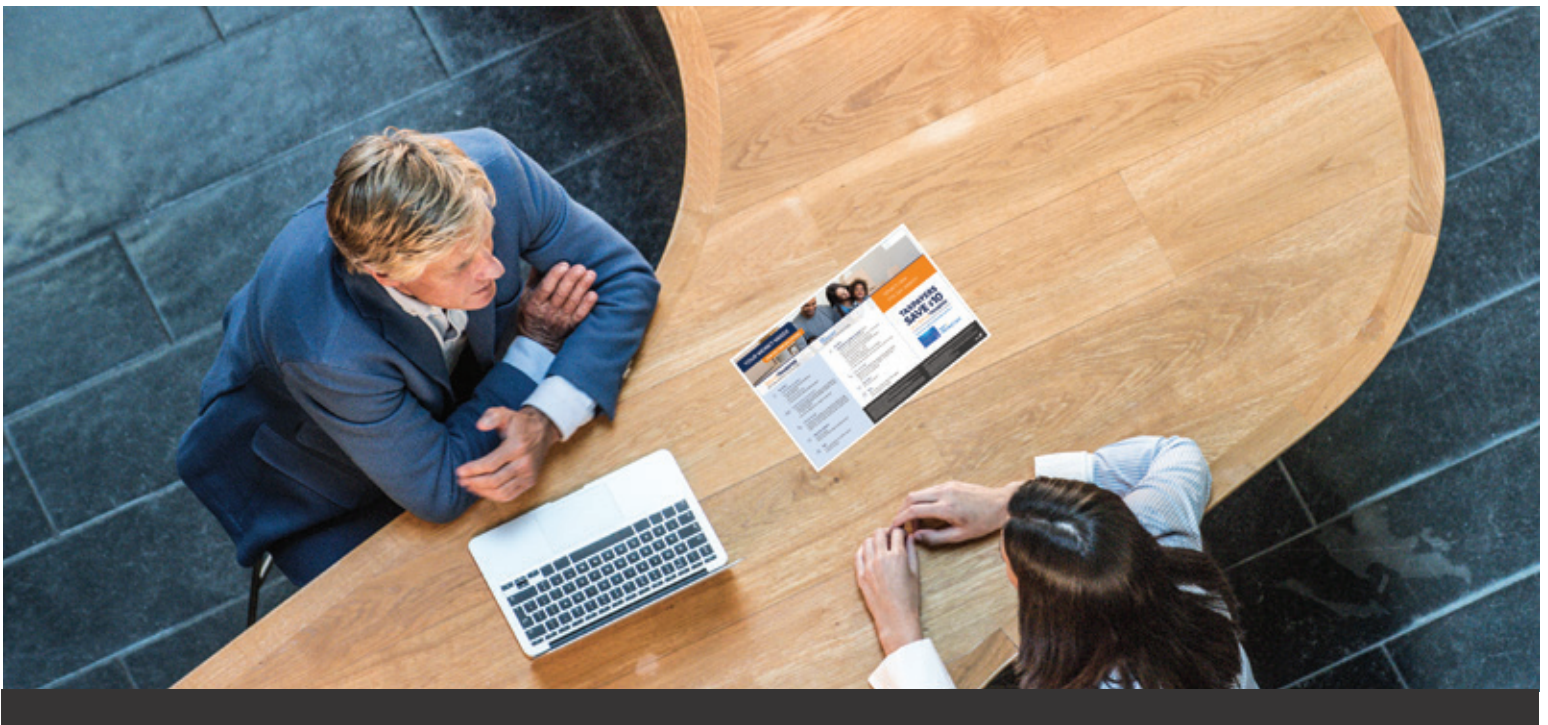
Along with the video, this Quick Script is designed to make it easy for you to talk about a Refund Transfer and the disbursement choices TPG offers your clients.

TIPS

- + You don't have to “sell” your clients a Refund Transfer. Educate them, like you would about tax preparation.
- + **Download** the Refund Transfer counter mat to use as a visual aid.
- + Display TPG marketing materials inside as well as outside your tax office, available from the “Supply Page” of our website or shop.sbtpg.com
- + Don't memorize too much. You want to avoid sounding “scripted.”
- + Make the script yours. Choose words that are comfortable for you to say.

Every year tax professionals choose TPG Refund Transfers to:

*Grow their business | Diversify their customer base | Conveniently, easily, and securely collect fees
Give their clients options | Get the best marketing support in the industry*



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INTRODUCE

Did you know that if you are getting a refund, you don't have to pay me up front to prepare your taxes? My prep fee can be automatically taken from your refund money. It's simple, fast, and the smart option—You never have to pull out your check book or credit card.

HIGHLIGHT THE BENEFITS (A GOOD TIME TO START USING USE THE DESK MAT)

It is great if you:

- + Don't want to pay cash today
- + Can't wait for an IRS check
- + Are affected by the PATH Act, which delays many refunds.
- + Don't have a bank account
- + Don't want a large refund check mailed to you
- + Don't want to pay by check or card

EXPLAIN HOW IT WORKS

1. For a one time charge, my prep fee is automatically taken from your refund.
2. In most cases, you can expect your refund within 21 days.
3. Unlike a traditional tax refund payment, I can offer you the choice of 4 ways to receive your refund. This includes: the Walmart MoneyCard®, Walmart Direct2Cash, Cashier's check, or direct deposit.
4. These don't delay your refund. In fact they are all faster than an IRS issued check.
5. Plus if you chose the Walmart MoneyCard, you will save \$10 and enjoy numerous card benefits, including no overdraft or bounced check fees, ever. And your money is insured by the FDIC.
6. If for whatever reason, the IRS doesn't send your refund, you will not be charged the processing fee. So there is no risk to you at all.

CONFIRM

So what do you think? Would you like to go with a Refund Transfer?
It's easy, safe, and very secure. Do you have any questions?