

Grow Your Practice with Your Free Pay-by-Refund Marketing Tool Kit



Let your clients know that you offer Pay-by-Refund services

Help clients understand how they can pay you directly from their refund

It's easy—just add your company name and phone number, print, and use

Dear Tax Preparer,

This letter includes information about how to use the Pay-by-Refund Marketing Kit. The kit is designed to help you spread the word about Pay-by-Refund services you offer. Whether a potential client is walking by your office window, or sitting in your waiting area, the kit materials will make them want to find out more about how your services can help them. The kit includes PDF files of two posters, a flyer, a desk tent card, and a reminder card. We have enclosed guidelines for how to customize your kit as well as some tips on how to use each item in your kit.

Our commitment

You can be confident Intuit Pay-by-Refund offers your clients convenience at one of the lowest prices in the industry. Your clients pay one flat bank setup fee of \$35 with no additional processing fees. You earn \$10¹ per funded federal Pay-by-Refund transaction you issue. [Click here to find out more about the Intuit Pay-by-Refund program.](#)

We know your clients depend on you to look out for their financial best interests. And Intuit is committed to help deliver the best overall financial outcomes for your clients. Wishing you great success in tax year 2016!

Sincerely,

A handwritten signature in black ink that reads 'Patti Newcomer'.

Patti Newcomer
V.P., Marketing | Intuit ProConnect Group

How to customize your Pay-by-Refund Marketing Tool Kit

The posters, flyer, and reminder card contain fields that you can fill in with your company information.

1. Open the file in Adobe Acrobat Reader (version 6.0 or higher)
2. Use the tab key on your keyboard to highlight a field, or click and select the contents of a field
3. Replace the contents of the editable fields with your information
4. Save the file (or Save As...)
5. Print the file to a color printer on white paper or bring to a print shop such as FedEx/Kinko's

Some tips for using each item in the kit:

Posters

We've included two sizes: 11" x 17" and 36" x 72" formats. The larger size can be printed at a local print shop like Kinko's. The smaller size can be printed on most office printers. We recommend you display the larger poster prominently in your office window or on your office wall so it is visible to people who walk by your office. We also suggest you display some of the smaller posters to be viewed by people who visit your office.

11" x 17" POSTER
(no cropmarks)



This poster has been designed with a white border to print on an office printer. You may also have a local print shop like Kinko's print this file for you on standard 11" x 17" white paper.

36" x 72" POSTER
(with cropmarks)



This large format poster has been designed to print at a local print shop like Kinko's on standard poster paper. Crop marks have been provided on this file to ensure proper trimming by the print shop.

How to customize your Pay-by-Refund Marketing Tool Kit (continued)

Flyer

The flyer presents an overview of Pay-by-Refund and explains the key benefits to clients. The flyer is letter size and can be printed on your office printer. Include the flyer with other information you share with clients, and have them handy at your desk in case clients ask for more information. You can also distribute flyers anywhere potential clients might see them.

LETTER-SIZED FLYER (no cropmarks)

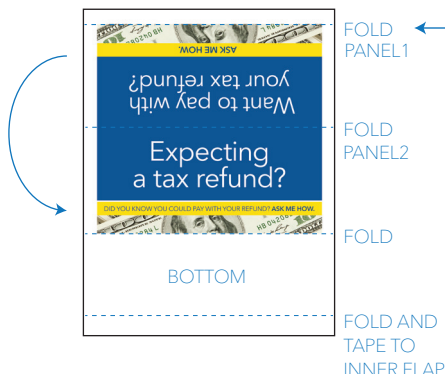


This flyer has been designed with a white border to print on an office printer, using standard white paper.

Desk Tent Card

For best results, print the tent cards on white cardstock or thick paper. Fold the card in half along both lines in the middle, and then fold in each end and tape together so that the card stands up by itself. Place a card at every desk, so clients see it when seated.

DESK TENT CARD (unfolded)



DESK TENT CARD (folded)

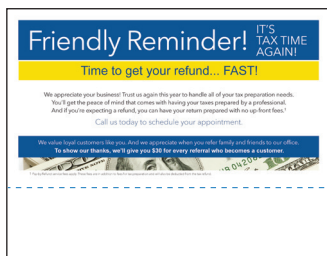


How to customize your Pay-by-Refund Marketing Tool Kit (continued)

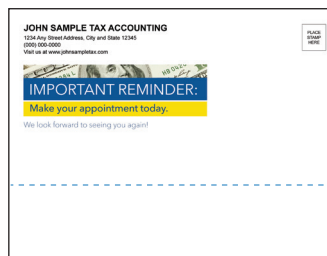
Reminder Card

Print the cards on white cardstock or thick paper. When it's time to remind clients to make appointments, customize and then print the cards front to back and trim off the extra paper along the dotted lines. Then use mailing labels and a first-class postage stamp to address and mail. You can also include a referral offer in the editable field on the pdf to let customers know you will reward them for bringing new business. Or, if you prefer not to include a referral offer, you can delete the placeholder information about the offer.

REMINDER CARD
Front



REMINDER CARD
Back*



When printing, be sure to align the front side to the back side.

After printing the front and back of the postcard, trim off at dotted line, label, stamp and mail.

TRIM OFF EXTRA PAPER



Please keep these blue areas free of content for postal requirements and to ensure proper delivery.

*Back Panel



1. Offer available for current ProSeries, Lacerte and ProConnect Tax Online customers only for a limited time only. Credit applies to Pay-by-Refund transactions through a participating bank only. Participating banks are Santa Barbara Tax Products Group, Refund Advantage, Republic Bank, and River City Bank. You must adopt industry refund transfer best practice principles by charging customary and reasonable processing fees to be eligible. Earn a \$10 credit for every federal Pay-by-Refund transaction funded through a participating bank from 1/1/17 thru 4/30/17 beyond the number of Pay-by-Refund transactions (formerly called "Refund Transfers") from the prior tax year. Credits will be delivered from participating banks by 5/31/17. \$35 bank set up fee applies to each federal Pay-by-Refund transaction. Additional fees apply to state Pay-by-Refund transactions. Terms, conditions, pricing features and support for all offers subject to change without notice.

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