

# TaxWizardUSA Washington, DC — Partner Portal Manual

*For: Marufa Akter, TaxWizardUSA Representative — Washington, DC Area*

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## 1. Your DC location at a glance

- **Your title:** TaxWizardUSA Representative — Washington, DC Area; Nationwide Attorney Specialist
- **Your direct line:** (202) 946-1707 (Quo) — business hours Monday–Friday, 9 AM–5 PM Eastern
- **Your DC mailbox:** [taxwizardusa.dc@gmail.com](mailto:taxwizardusa.dc@gmail.com)
- **Your booking link:** [calendly.com/marufa/30min](https://calendly.com/marufa/30min)
- **Your public page:** [taxwizardsusa.com/washington-dc.html](https://taxwizardsusa.com/washington-dc.html)
- **Your attorney page:** [taxwizardsusa.com/attorneys.html](https://taxwizardsusa.com/attorneys.html)
- **The handbook page:** [taxwizardsusa.com/attorney-handbook.html](https://taxwizardsusa.com/attorney-handbook.html)
- **Your portal:** [taxwizardsusa.com/dc-portal.html](https://taxwizardsusa.com/dc-portal.html)
- **Escalation:** Rafael Rodriguez, Jr., MBA — (954) 352-3927

The portal is your home base. Every system below opens from the portal, each at its own secure sign-in. Bookmark the portal and start your day there.

## 2. The systems, one by one

### Quo — your phone line and AI receptionist

- Sign in at [app.quo.com](https://app.quo.com) (tile 1 on the portal).
- This is where the (202) 946-1707 line lives: calls, voicemail, and text messages.
- **Sona, the AI receptionist**, answers whenever a call is missed. She greets the caller for TaxWizardUSA DC, takes a message, and the details are emailed to you and to the main office right away — a missed call is never a lost client.
- Business hours are set to Monday–Friday, 9 AM–5 PM Eastern. Outside those hours, Sona takes the message.
- Return every Sona message and voicemail within one business hour.

### Gmail — your DC mailbox

- Sign in at [mail.google.com](https://mail.google.com) with the DC account: **[taxwizardusa.dc@gmail.com](mailto:taxwizardusa.dc@gmail.com)** (tile 2).
- Client email, Sona message notices, and Calendly confirmations land here.

- Google also sends this mailbox's mail to your personal Gmail once you confirm it: watch for Google's forwarding confirmation email and click the confirmation link so both inboxes stay in sync.
- Keep client documents in this mailbox's Drive folders — never on a personal account.

### **Calendly — your appointments**

- Sign in at [calendly.com](https://calendly.com) (tile 3) to see your bookings.
- Clients book their own 30-minute call at **[calendly.com/marufa/30min](https://calendly.com/marufa/30min)** — that is the link to share everywhere: email signature, LinkedIn, and your DC page.
- If a client needs a different time, reschedule from the Calendly dashboard rather than by email back-and-forth.
- Block personal time in Calendly as soon as you know it, so clients never book over it.

### **HoneyBook — clients, engagement letters, and invoices**

- Sign in at [app.honeybook.com](https://app.honeybook.com) (tile 4).
- HoneyBook is the billing system of record. Every new client is created here, receives an engagement letter here, and is invoiced here — client information stays in the system, never in side spreadsheets or personal notes.
- Clients pay by credit card through their HoneyBook invoice. We do not take Zelle.
- Your compensation terms — your split and the payout schedule (ACH, Friday of the week after the client's payment clears) — are in your Partner Agreement, sent October 25, 2026.

### **Zoom — meetings and training**

- Sign in at [zoom.us](https://zoom.us) (tile 5) for scheduled video meetings.
- The weekly free live training, "See Your Business the Way a CFO Does," runs Wednesdays at 2:00 PM Eastern — you are welcome to invite your DC clients and attorney contacts.

## **3. Your daily routine**

- Open the portal and sign in to Quo — check voicemail and Sona messages first
- Check the DC mailbox; answer client email within one business hour
- Review today's Calendly bookings and prepare for each call
- Log every new client in HoneyBook the same day they engage
- End of day: clear unanswered messages or hand them to the main office with a note

## **4. How a new client flows**

1. The client calls (202) 946-1707 or books at [calendly.com/marufa/30min](https://calendly.com/marufa/30min).
2. On the call, map the work: return, planning, or bookkeeping — attorneys and law firms are your specialty.

3. Create the client in HoneyBook and send the engagement letter and invoice from there.
4. Preparation and review run through the TaxWizardUSA system with the main office in Hollywood, Florida; you stay the client's point of contact throughout.

## 5. When to escalate

Call Rafael at (954) 352-3927 — do not wait for email — when:

- A client matter is urgent, technical, or outside the DC location's scope
- Anything involves an IRS notice, a deadline inside 10 days, or a payment problem
- A caller asks for pricing, terms, or commitments beyond what is published on [taxwizardsusa.com](http://taxwizardsusa.com)
- Any system in this manual is locked, down, or behaving strangely

## 6. Security rules

- The portal stores no passwords, and neither should a document, email, or text. Keep every password in your own password manager.
- Never share a password, a sign-in code, or a client's documents outside the systems above.
- Client tax documents move only through HoneyBook and the DC mailbox — never through personal email or messaging apps.
- If a sign-in ever looks wrong, stop and call the main office before entering anything.

## 7. The attorney practice — your specialty

You front the nationwide attorney program as **Nationwide Attorney Specialist**. Everything in this section is live on [taxwizardsusa.com](http://taxwizardsusa.com) and in your portal.

### The offer (published prices)

- **Cleanup from \$495** — priced at the greater of \$495 or the firm's monthly plan rate × months of catch-up
- **Monthly bookkeeping:** Solo from **\$275/mo** · Small Firm from **\$695/mo** · Growing Firm from **\$1,195/mo** · larger or multi-office firms from \$1,495/mo · trust-account-only service from **\$225/mo**
- **Federal organization returns:** partnership (1065) from \$1,250 · S corporation (1120-S) from \$1,150 — each includes 4 K-1s; monthly clients receive 10% off the return
- The final quote is always confirmed on a call against the firm's actual books. Never quote beyond the published structure — anything else is an escalation to Rafael.

### The For Attorneys page — [taxwizardsusa.com/attorneys.html](http://taxwizardsusa.com/attorneys.html)

The public offer page: the problems we solve, cleanup, QuickBooks Online or Xero, monthly plans, and return filing. Share this link with any attorney contact.

### The Instant Quote calculator — [taxwizardsusa.com/attorney-calculator.html](http://taxwizardsusa.com/attorney-calculator.html)

Prospects get a real estimate in about a minute (attorneys, trust and operating accounts, transaction volume, QuickBooks level, cleanup months). Send this link when an attorney asks "what would it cost?" — then book the confirmation call.

## **The handbook — Accounting Books for Attorneys**

Our free handbook for law firm bookkeeping: trust accounting fundamentals, QuickBooks Online and Xero setup, the monthly checklist with the three-way reconciliation, and a section on the trust rules of every state.

- **Download page (share this one):** [taxwizardsusa.com/attorney-handbook.html](http://taxwizardsusa.com/attorney-handbook.html) — the prospect enters name, phone, and email, and the download opens right away. Every download emails the lead to the main office, and leads are followed up within one business hour. Attorney leads route to you.
- **Your copy:** the PDF is in your portal, in the "Handbook & resources" section — the same section that holds this manual.

## **Your 10 LinkedIn posts**

Ten ready-to-post LinkedIn items — copy, images, and links — are in your portal, in the "LinkedIn posts — ready to copy" section (also downloadable there as one pack). They announce the handbook, explain the three-way reconciliation and retainer rules, link the calculator, and introduce you as the Nationwide Attorney Specialist. Post from your own LinkedIn profile, one at a time, in order.

## **The line to use on every attorney engagement**

*Rafael Rodriguez, Jr., MBA is a tax preparer, not a CPA — the CPA is a higher, state-licensed credential. Services requiring a CPA are performed by our licensed CPA on staff.*

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