

SAVINGS AT TAX TIME TOOLS FOR TAX PREPARERS AND ASSET COACHES

1. Talk to your clients about the fact that tax time is the perfect time to save, no matter the dollar amount.
 - Some conversation starters with clients:
 - i. *How much of your refund do you want to put into your savings today?*
 - ii. *Are you interested in a raffle to possibly win \$100 or even \$10,000? All you have to do is save \$50.*
 - iii. *How about saving some of your refund for the future?*
 - iv. *You can never be too prepared! Have you thought about saving some of your refund for emergencies or a rainy day?*
2. Tell them about the savings raffles and the opportunity to win additional cash for saving a portion (\$50 or more) of their refund, plus how they will receive a free EKS bag or other prize (depends on location)
3. If they agree to save, enter checking and savings accounts number, bank name and account type in the “e-file” section of the return - double check the account info you enter.
4. Complete the TaxSlayer custom question “Would you like to split your refund today?”
5. If client saved at least \$50 by splitting their refund in multiple accounts, register your client for the following raffles:
 - Link to **local EKS Savings Raffle** - www.surveymonkey.com/r/saveraffle

Note: You will need to enter the client’s:

 - First and last name
 - Phone number
 - Email
 - Tax site name
 - Link to **national Save Your Refund Drawing** - www.SaveYourRefund.com
 - i. For weekly, you will need:
 1. Contact Info - First and last name, Phone number AND/OR email, Zip code, # of children in home, ethnicity, State of Residence, Tax preparation site
 2. Savings Info - Total amount of refund, Amount deposited in each account, Type of each account used, Amount used to purchase bonds (if applicable)
 - ii. For Grand Prize Photo Contest, you will need everything above plus a photo and a caption.



EarnIt!
KeepIt!
SaveIt!

