



Advisor Brief:

How Paprika Fits into Your Client Strategy

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Your clients rely on you to see the entire tax picture—and to protect them

But when it comes to hiring dependents, even experienced advisors run into friction:

- Market-based wage data is fragmented or unclear
- Job roles vary widely by client
- Child labor and state rules are nuanced and state-specific
- IRS documentation standards require precision
- The process is time-consuming and difficult to standardize

The result?

A powerful strategy that's often underused—or avoided—because it feels operationally messy or risky.

You've earned your client's trust

You don't want:

- A third party disrupting that relationship
- A black-box solution you can't stand behind
- A strategy that introduces uncertainty into your recommendations

You want **confidence, clarity, and control**—without having to personally build wage studies, templates, and documentation from scratch.

That's exactly why PaprikaTax exists

We focus on one specialized layer of the tax ecosystem:

Compliant family payroll planning and documentation

We are not:

- A tax preparer
- A competing advisor
- A replacement for your judgment

You remain the strategist.

PaprikaTax operates quietly in the background—like a technical specialist supporting your work. Think of us as a **role player, not the quarterback**.

Two simple ways to use PaprikaTax

You decide how involved you want to be. Both paths work well.

Option 1: Refer It (Most Common)

You share your PaprikaTax link and let the client go through the process on their own—with our support.

- Minimal time commitment for you
- You look thoughtful and proactive
- The client gets a structured, defensible outcome
- You stay in control of the broader strategy

This is the **lowest friction, highest leverage** path.

Option 2: Deliver It as Your Service (More Hands-On)

You walk through the process with your client—during a planning session or a dedicated call—and bill the strategy work as your own service.

- You connect the dots with broader planning
- You reinforce your role as the strategist
- You can shape how the strategy integrates into the full tax picture

Same outcome. More control. Your billable planning work.

What the process actually looks like

It's designed to be simple, fast, and repeatable.

Step 1: Initial Screening

The client completes:

- A **tax savings estimator**
- A short **eligibility quiz**

This quickly determines if the strategy is a good fit.

If something unusual comes up (rare), like a dependent earning more than the parent, we'll recommend a quick consulting call before moving forward.
(You're welcome to join—preferred but not required.)

Step 2: Payment & Green Light

Once eligibility is confirmed, the client completes payment.

At this point, they're cleared to move forward with confidence.

Step 3: 15-Minute Intake

The client completes a structured intake form:

- Business details
- Dependent roles
- Tasks and responsibilities

Time required: ~**15 minutes**

There's also a built-in chatbot for real-time, general guidance if needed.

Step 4: Strategy + Workpapers (Next Business Day)

By the next business day, the client receives:

- A **custom wage strategy**
- **Audit-ready workpapers**
- Supporting documentation
- Planning playbooks—with full-service and firm-delivered engagements (e.g., Roth IRA strategies for dependents)

Questions can be submitted during intake or by email—we respond within one business day.

Step 5: Optional Support (If Needed)

- Email Q&A on the case—we respond within one business day
- Live CPA strategy session—included with full-service engagements

We're here if needed—but never required.

A clean, repeatable system

- 1 You refer or integrate PaprikaTax into your workflow
- 2 We handle calculations, documentation, and support
- 3 You incorporate the output into your broader strategy

No reinvention. No guesswork. No added complexity.

What your client receives

With a single engagement, PaprikaTax provides:

- CPA-signed, audit-ready documentation
- Market-based wage analysis and justification
- Job role alignment tailored to the client's business
- State and federal compliance considerations
- ResumeBuilder time tracker—contemporaneous hour-and-task documentation that doubles as a résumé for the dependent
- Planning playbooks (with full-service and firm-delivered engagements), including: Roth IRA strategies for dependents · Education-related tax benefits · Incentive pay and catch-up payroll
- Templates, calculators, and guides
- Email-based Q&A—answered within one business day

You deliver a **polished, defensible strategy—without doing the legwork.**

Why advisors choose to partner with PaprikaTax

- **You remain the hero** — the strategy reinforces your expertise
- **You reduce risk** — everything is structured and defensible
- **You save time** — no wage studies or documentation builds
- **You expand your value** — confidently offer a powerful strategy
- **We never compete with you** — we support your role, period
- **We never market to your clients** — that's in writing
- **You choose the level of involvement** — fully hands-off or collaborative

This is what modern advisory support should feel like:

specialized, reliable, and invisible—unless you want otherwise.

Where we fit (and where we don't)

We're strong believers in staying in our lane.

- You see the full picture
- You understand the client relationship

- You make the final call

We bring depth in one narrow area and **plug into your process where it makes sense.**

A quick note on working together

If you'd like, we're happy to:

- Walk you through the intake
- Show sample deliverables
- Answer questions about edge cases

No pressure. Just clarity.

Who this is for

PaprikaTax is a strong fit for:

- Tax advisors and enrolled agents
 - CPAs and fractional CFOs
 - Bookkeepers supporting advisory firms
 - Family office professionals
 - Wealth advisors
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How advisors typically use PaprikaTax

- As a value-add for existing clients
 - As a billable deliverable
 - As a white-label technical resource
 - As a trusted referral partner
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Final thought

You design the strategy.

We make it easier to execute.