



## 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.

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## **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.

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## 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.**

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## Two simple ways to use PaprikaTax

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

### Option 1: The Easy Referral (Most Common)

You share your discount code 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: The Guided Approach (More Hands-On)

You walk through the process with your client—either during a planning session or a dedicated call.

- 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. Slightly more involvement.

## 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.)

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### Step 2: Payment & Green Light

Once eligibility is confirmed, the client completes payment.

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

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### 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.

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## Step 4: Strategy + Workpapers (Next Business Day)

By the next business day, the client receives:

- A **custom wage strategy**
- **Audit-ready workpapers**
- Supporting documentation
- Any requested playbooks (e.g., Roth IRA strategies)

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

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## Step 5: Optional Support (If Needed)

- Email Q&A included
- Optional live consulting available

We're here if needed—but never required.

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## 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.**

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## 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
- Planning playbooks, including:
  - Roth IRA strategies for dependents
  - Education-related tax benefits
  - Incentive pay and catch-up payroll
- Templates, calculators, and guides
- Email-based Q&A and optional consulting

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

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## 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
- **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.**

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## 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.**

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## **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.

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## **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.