

MARKETING, GROWTH, AND PROFESSIONAL DEVELOPMENT

Homework Worksheet + Answer Key

Choose the best answer for each question. Complete the worksheet before reviewing the answer key.

Student Information

Name: _____ Date: _____

1. What is the strongest tax marketing promise described in the lesson?

- | |
|--|
| A. Guaranteed maximum refund |
| B. A clear, accurate process built around careful intake, clear explanations, secure handling, transparent pricing, and dependable follow-up |
| C. Instant IRS refund |
| D. Any refund amount the client requests |

2. Which is an appropriate audience a tax business may choose to focus on?

- | |
|--|
| A. Only people guaranteed large refunds |
| B. First-time filers, working families, self-employed service providers, gig workers, retirees, or local small-business owners |
| C. Only taxpayers with bank products |
| D. Only prior clients |

3. Which content category focuses on documents, deadlines, recordkeeping, credits, mistakes, and tax-law changes?

- | |
|------------------|
| A. Education |
| B. Trust |
| C. Invitation |
| D. Entertainment |

4. Which content category should explain how to book, what to bring, who the service is for, and what happens next?

- | |
|---------------|
| A. Education |
| B. Trust |
| C. Invitation |
| D. Security |

5. Which is an example of a trust-building marketing topic?

- | |
|--|
| A. Guaranteed refunds |
| B. Security practices and professional development |
| C. Inflated refund testimonials |
| D. Private client documents |

6. What should be protected in every marketing channel?

- A. Only the business logo
- B. Taxpayer confidentiality
- C. Only employee data
- D. Only payment information

7. Can a preparer post a client return, refund amount, document, testimonial, or image without appropriate written permission and privacy review?

- A. Yes
- B. No
- C. Only on weekends
- D. Only if the refund is large

8. According to the sample weekly rhythm, what type of content is suggested for Monday?

- A. Appointment invitation
- B. Tax education post
- C. Community story
- D. Tax myth video

9. What matters more than posting volume?

- A. Quality and accuracy
- B. Number of hashtags
- C. Posting every hour
- D. Using refund amounts

10. What must referral programs and giveaways comply with?

- A. Federal tax-practice rules, state law, platform rules, banking-partner rules, and professional licensing rules
- B. Only social media rules
- C. Only bank rules
- D. No rules if no purchase is required

11. What should a referral reward NOT be based on?

- A. Service quality

- B. Program terms
- C. Refund size or tax results
- D. A written referral policy

12. What type of reviews should clients be asked to provide?

- A. Reviews based on service, communication, and professionalism
- B. Reviews containing private tax facts
- C. Guaranteed-outcome reviews
- D. Fake reviews created by staff

13. What does IRC section 7216 restrict?

- A. Use and disclosure of tax return information
- B. Only refund transfers
- C. Only e-file acknowledgments
- D. Only social media ads

14. Does information given for tax preparation automatically authorize use for unrelated marketing?

- A. Yes
- B. No
- C. Only if the client has a refund
- D. Only for email

15. Should a tax-client list be uploaded to social-media custom audiences without specific legal and privacy review?

- A. Yes
- B. No
- C. Only during filing season
- D. Only if names are removed

16. Which marketing claim should be avoided?

- A. "We identify lawful credits and deductions supported by your facts."
- B. "Every return receives an accuracy and documentation review."
- C. "Guaranteed maximum refund."
- D. "Refund timing and amounts depend on the return and IRS processing."

17. When may a preparer use the phrase 'AFSP - Record of Completion'?

- | |
|---|
| A. Any time they hold a PTIN |
| B. Only when it is currently earned and valid |
| C. Whenever the business has an EFIN |
| D. Whenever they take continuing education |

18. What is the foundation of sustainable professional growth described in the lesson?

- | |
|---|
| A. Accuracy, consistency, current research, training, written systems, and quality monitoring |
| B. Volume alone |
| C. Maximum-refund advertising |
| D. Using prior-year rules |

Answer Key

Check your answers after completing the worksheet.

1. **B** — A clear, accurate process built around careful intake, clear explanations, secure handling, transparent pricing, and dependable follow-up
2. **B** — First-time filers, working families, self-employed service providers, gig workers, retirees, or local small-business owners
3. **A** — Education
4. **C** — Invitation
5. **B** — Security practices and professional development
6. **B** — Taxpayer confidentiality
7. **B** — No
8. **B** — Tax education post
9. **A** — Quality and accuracy
10. **A** — Federal tax-practice rules, state law, platform rules, banking-partner rules, and professional licensing rules
11. **C** — Refund size or tax results
12. **A** — Reviews based on service, communication, and professionalism
13. **A** — Use and disclosure of tax return information
14. **B** — No
15. **B** — No
16. **C** — "Guaranteed maximum refund."
17. **B** — Only when it is currently earned and valid
18. **A** — Accuracy, consistency, current research, training, written systems, and quality monitoring