

The Deluxe Work Opportunity Tax Credit (WOTC) program gives accounting professionals easy-to-use software to help clients save thousands of dollars per year in federal tax credits and stay compliant with HR laws.

By helping your clients take advantage of WOTC, many will save more in tax credits than they spend on accounting and payroll fees, combined.

If you're like most accountants, the majority of your small to mid-sized business clients do not take advantage of the WOTC program, which provides employers with \$2,400 to \$9,600 in federal tax credits per eligible new hire. There is no cap on the amount of credits a business may earn.

Tax Savings Assuming A Client Earns \$2,400 Per New Hire

1 New Hire	x	\$2,400 Tax Credits	=	\$2,400 in Tax Savings Per Year
5 New Hires	x	\$2,400 Tax Credits	=	\$12,000 in Tax Savings Per Year
10 New Hires	x	\$2,400 Tax Credits	=	\$24,000 in Tax Savings Per Year
25 New Hires	x	\$2,400 Tax Credits	=	\$60,000 in Tax Savings Per Year
50 New Hires	x	\$2,400 Tax Credits	=	\$120,000 in Tax Savings Per Year
100 New Hires	x	\$2,400 Tax Credits	=	\$240,000 in Tax Savings Per Year

What is the WOTC program?

The WOTC program was created to help individuals who may face challenges in finding employment. Individuals who may qualify include those who are on food stamps, those who have been unemployed for 26 weeks or more, veterans, those who live in low-income areas, ex-felons, and those enrolled in the Temporary Assistance for Needy Families program.

Millions of Americans qualify their employers to receive WOTC credits; however, the majority of business owners do not file the required documentation to collect these credits.

How does Deluxe make it easy for accountants to offer the WOTC program to their clients?

Deluxe automates the entire WOTC process for employers and accountants. Deluxe will file the required documentation with state workforce agencies, calculate the credits that are earned, and provide accountants with a tax packet report. This report gives them the data needed to complete Form 5884, which is used to claim the Work Opportunity Credit.

Which of my clients can benefit from the WOTC program?

The WOTC program is especially helpful for employers who hire hourly workers, e.g. food service/franchisees, retail, hospitality, healthcare, and manual labor.

How can Deluxe help my clients stay compliant with HR laws?

According to Title VII of the Civil Rights Act, all businesses with 15 employees or more must keep each job application and resume received for one year after each hiring decision has been made. Failure to comply with this law can result in the Equal Employment Opportunity Commission conducting an investigation and pursuing legal action against the employer.

Deluxe helps employers stay compliant with Title VII, and also automates the collection and storage of other mandated documents from employees, including Forms I-9 and W-4.

Can a client use Deluxe regardless of the payroll provider they use?

Yes, Deluxe is available as a stand-alone platform, and can help clients using any payroll provider.

Deluxe for Accountants in a few easy steps:

1

Log into your dashboard at deluxetaxcredits.com

You'll see a list of your clients and key statistics, including the number of tax credits they've received.

Client	Payroll Provider	WOTC Hires	Tax Credits Earned
Arby's Franchise Group of Florida	Payentry	24	\$57,600
Davidson Medical Group	Paylocity	7	\$16,800
Law Offices of Daniel Rao	Intuit	1	\$2,400
McDonald's of Miami	Paycom	22	\$52,800
Wendy's Franchisee Partners	Paychex	17	\$40,800

2

Invite a client to speak with a Deluxe Work Opportunity Tax Credit specialist.

A Deluxe representative will schedule a free, one-on-one informative session with your client, and provide:

- ✔ A detailed review of the WOTC program
- ✔ Estimate of tax credits they may be eligible to receive
- ✔ Review of Title VII of the Civil Rights Act
- ✔ Demonstration of the Deluxe platform
- ✔ Review of requirements for I-9 and W-4 storage
- ✔ Questions and Answers

3

Clients who purchase Deluxe will be able to manage their hiring, onboarding and tax credit needs.

Deluxe makes it easy for companies to identify tax credit eligible new hires and manage all new hire onboarding documents including Forms I-9, W-4 and more.

Applicant Tracker

Administrative Assistant
Palo Alto, CA

Buttons: New, Pending, Maybe, Offer, Hire, Decline

Name	Status	Date Applied	Tax Credit
Meredith Carter	Status: Hire	09/04/2019	\$9,600
Muhammad Alalawi	Status: Hire	09/04/2019	
Debra Dumas	Status: Hire	09/04/2019	
Johnson Maitman	Status: Hire	09/04/2019	
Antony Craighead	Status: Hire	09/04/2019	\$4,800
Myron Boehman	Status: Hire	09/04/2019	
Kurt Loughlin	Status: Hire	09/04/2019	\$9,600
Gerenda Stewczyk	Status: Hire	09/04/2019	\$2,400
Michaela Spillman	Status: Hire	09/04/2019	



Identify Tax Credit Eligible Applicants

Securely collect and store required onboarding documents (I-9, W-4, handbook, and more)

Employment Eligibility Verification

U.S. Department of Homeland Security
U.S. Citizenship and Immigration Services

Section 1: Employee Information and Attestation

Section 2: Employer Information and Attestation

Section 3: Employer Information and Attestation

Form W-4 (2017)

Employee's Social Security Number

Marital Status

Number of Dependents

Other Income

Other Deductions

Signature of Employee

Date

Company Logo

Employee Handbook






I have received the Employee Handbook. I have read and agree to abide by the policies and procedures contained in the Handbook.

[Name of Employee] [Sign Date]

4

Deluxe will automatically complete the required calculations for accountants to complete Form 5884.

Deluxe automatically creates a tax packet report for each client, which accountants can download from their Deluxe account. Form 5884 allows clients to claim the Work Opportunity Credit.

Client's Company Name	Form 5884	Tax Credits Earned	Payroll Provider
Arby's Franchise Group of Florida	 Download Tax Packet	\$57,600	Payentry
Davidson Medical Group	 Download Tax Packet	\$16,800	Paylocity
Law Offices of Daniel Rao	 Download Tax Packet	\$2,400	Intuit
McDonald's of Miami	 Download Tax Packet	\$52,800	Paycom
Wendy's Franchisee Partners	 Download Tax Packet	\$40,800	Paychex

The Numbers: How Deluxe Offsets Accounting and Payroll Fees Through Tax Credits

	New WOTC Hires Per Year	Cost to Employer to Process WOTC (\$299/New Hire)	Estimated Accounting Fees	Estimated Payroll Fee	Total Fees Paid By Employer ⁽¹⁾	Total Tax Credits Earned (Assume \$2,400/New Hire) ⁽²⁾	Net Savings Per Year for Client ⁽³⁾
1 to 25 Employees	5	\$1,495	\$5,000	\$1,650	\$8,145	\$12,000	\$3,855
26 to 50 Employees	10	\$2,990	\$10,000	\$3,300	\$16,290	\$24,000	\$7,710
51 to 100 Employees	20	\$5,980	\$20,000	\$6,600	\$32,580	\$48,000	\$15,420
101 to 500 Employees	100	\$29,900	\$100,000	\$33,000	\$162,900	\$240,000	\$77,100
501 to 1000 Employees	200	\$59,800	\$200,000	\$66,000	\$325,800	\$480,000	\$154,200

⁽¹⁾ Sum of employer's cost to process WOTC and estimated accounting and payroll fees.

⁽²⁾ For purposes of this calculation, estimate an average savings of \$2,400 per new employee.

⁽³⁾ Total savings to client after deducting fees for WOTC processing, accounting, and payroll.