



Consultant Partner Guide

How licensed property tax consultants win clients and manage cases on Property Tax Edge — with FAQ

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1. The opportunity

Property Tax Edge connects homeowners who want help appealing their property taxes with verified, licensed consultants — nationwide — and gives you professional tools to manage and win those cases. You keep your own clients, set your own fees, and we never take a percentage of your work. You simply pay for the leads and tools you use.

2. How to join

- 1 Create your consultant listing: firm details, license number and state, the states and counties you serve, and your specialties.
- 2 Confirm your license and attest that you hold the required license and E&O; insurance. There is no fee to list — creating your directory listing is free.
- 3 We review your application. Once approved, your verified profile goes live and you receive **3 free lead credits** to start.
- 4 Add a subscription (per-case or annual) to unlock the full professional tool suite.

3. The lead marketplace

Homeowners submit requests for help with their appeal. The moment a request comes in, we email every approved consultant whose service area matches it. Leads are shared — more than one consultant may unlock the same lead — so prompt follow-up wins the engagement.

- **Instant email alerts** when a homeowner in your states requests help.
- **Matched by service area** — you only see leads in the states you serve.
- **Unlock with 1 credit** to reveal the homeowner's full contact details.
- **You own the relationship** — contact, quote, and engage the client on your own terms.

4. Lead credits & pricing

Plan	Price	What's included
Starter pack	\$99	5 lead credits (\$19.80 / lead)
Pro pack	\$179	10 lead credits (\$17.90 / lead)
Bulk pack	\$399	25 lead credits (\$15.96 / lead)

Credits never expire and are used one per lead unlocked. New approved consultants start with 3 free credits.

5. Managing leads & ROI

- Move each unlocked lead through your pipeline: new → contacted → quoted → won / lost.
- Record the fee earned on won engagements.
- Your dashboard shows leads unlocked, in progress, won, credits spent, and total revenue — so you can see your exact return on the marketplace.

6. The consultant portal

- **Client management** — track every case with status, deadlines, hearing dates, and realized savings.
- **Bulk import & export** — upload your entire client book from a CSV, and export your data anytime.
- **Report generation** — produce client-ready case summaries.
- **Deadline tracking** across all your clients.

7. Your profile & reviews

Your public profile in the Consultant Directory shows your firm, states served, specialties, verified-license badge, and client reviews. Reviews are verified and FTC-compliant — they come only from real, signed-in users, which builds the trust that wins more leads.

8. Pro tools you get

- Unlimited AI Evidence Packets with auto-sourced comparable sales.
- Sales Comparables Analyzer, Assessment Ratio Analysis, Equal & Uniform Builder, and Income Approach Calculator.
- Jurisdiction Intelligence Center with county-level analytics.
- All 50-state appeal rules, deadlines, exemptions, and tax codes.

9. Plans & pricing

Plan	Price	What's included
Directory listing	Free	Verified listing in the Consultant Directory (includes 3 free lead credits)
Consultant (per case)	\$99 one-time	Full professional tool suite for a single case
Consultant (annual)	\$399 / year	Full professional tool suite, unlimited, all year
Lead credits	\$99–\$399	Pay-per-lead packs (5, 10, or 25) — buy as you go

10. Frequently asked questions

Q: What does it cost to get started?

Nothing to list — your verified directory listing is free and includes 3 free lead credits. To unlock the full professional tool suite, add a subscription (\$99 per case or \$399/year), and buy lead credits as you need them.

Q: Do you take a percentage of my fees?

No. Property Tax Edge is pay-per-lead, not commission. You set your own prices and keep 100% of what you charge your clients.

Q: Are leads exclusive to me?

No — leads are shared, meaning more than one consultant in the area can unlock the same homeowner. Whoever follows up fastest and best usually wins the engagement, so respond promptly to lead alerts.

Q: How do I get notified of new leads?

As soon as a homeowner in one of your service-area states submits a request, we email you automatically. You then unlock the lead with one credit to see their contact details.

Q: Do credits expire?

No. Credits stay on your account until you use them, one per lead unlocked.

Q: How long does approval take, and what do I need?

You'll provide your license number and state and attest to your license and E&O; insurance. We review applications before your listing goes live; reach out to hello@propertytaxedge.com if you need a status update.

Q: Which states and counties can I serve?

Any you select in your listing. You'll only be matched to leads in those states, and homeowners see you in the directory for those areas.

Q: Can I bring my existing clients onto the platform?

Yes — use the bulk CSV import in the consultant portal to load your whole client book, then track each case and export anytime.

Q: How do reviews work?

Only verified, signed-in users can leave a review, and one per client per consultant — keeping them FTC-compliant and trustworthy. Reviews appear on your public profile.

Q: What if a lead doesn't respond or isn't a fit?

Because leads are inexpensive and shared, treat each as an opportunity to be first to follow up. Track outcomes in your pipeline so you can see your true cost-per-win over time.

Q: Can I cancel my subscription?

Yes, anytime. Cancellation takes effect at the end of the current billing period; we don't provide partial refunds for the current period. Creating your listing is free, so there is no upfront cost to join.

Q: Is this a substitute for my license or legal/tax advice?

No. You remain responsible for your professional licensing and the advice you give clients. Property Tax Edge provides tools and lead-matching, not legal or tax advice.

Q: I have another question.

Email hello@propertytaxedge.com — we're happy to help you get set up.

This guide and the Property Tax Edge service provide information and tools, not legal or financial advice. No attorney-client relationship is formed. Property tax laws, deadlines, and forms vary by jurisdiction and change frequently — always verify with your local taxing authority before filing. Payments are processed securely by Stripe. Property Tax Edge is owned and operated by Exitus Strategies LLC. Questions? hello@propertytaxedge.com © 2026 Exitus Strategies LLC.