



Happy Tax Acquires Emerging Franchisor Opportunity Tax and Insurance & Signs Agreement with Santa Barbara Tax Products Group (TPG) to provide refund transfer and refund advance products

MIAMI BEACH--August 28, 2017--Happy Tax, the easiest way to have an on-demand CPA-prepared tax return filed, is pleased to announce that the company has acquired [Opportunity Tax and Insurance](#), a franchise network of 8 storefront tax preparation and insurance sales offices in North Carolina, Georgia and Florida.

"I'm thrilled that we have the ability to provide our world class support to the franchisees at Opportunity Tax and Insurance," explains Happy Tax founder and CEO [Mario Costanz](#). "Since our inception, we have received many inquiries from traditional brick and mortar independent tax services wanting to convert their tax practices to us however we couldn't accommodate them without having this standalone retail tax brand in place; **now we can.**"

Happy Tax will operate each brand separately and welcomes the Opportunity Tax and Insurance employees, team members and franchisees to the Happy Tax family. The company is currently working with independent tax business owners across the country to help to them convert their businesses to the Opportunity Tax and Insurance brand. The conversion program is anticipated to help between 50 and 100 retail tax offices this fiscal year and provide them with the additional operational and marketing support they need to grow their businesses.

In addition to no longer having to operate all by themselves, those converting their tax businesses to Opportunity Tax and Insurance can start to offer insurance services, utilize the Happy Tax network of CPA's to prepare returns for independent contractors and also become a [Happy Tax Area Representative](#). The company is waiving the \$25,000 Opportunity Tax franchise fee and the \$20,000 Happy Tax franchise fee for tax businesses with over 300 paid tax returns completed in the past year that become an Area Representative with the company.

Area Representatives serve as mentors for franchisees of Happy Tax and Opportunity Tax and Insurance, working in their areas as boots on the ground to assist those interested in the firm's multiple franchise opportunities. They also provide an additional level of coaching to franchisees in their exclusive area to help strengthen and optimize their businesses alongside with the support provided by the team at Happy Tax corporate HQ. Area Representatives receive 50 percent of all franchise fees and as well as royalties generated in their geographic area. Pricing for areas start at \$100,000 and can be \$250,000 or higher depending on population size. Financing is available.

The company is also announcing a deal signed with Santa Barbara Tax Products Group (TPG), a Green Dot Company ([NYSE: GDOT](#)). TPG will provide all refund transfer and refund advance products for Happy Tax and Opportunity Tax. TPG will also be extending its PreSeason Funds program directly to those converting to Opportunity Tax with dual underwriting being provided by TPG and Happy Tax.

"We're excited to work with Happy Tax and Opportunity Tax and Insurance to provide industry-leading products to help their franchisees grow their businesses." said Brian Schmidt, [TPG's](#) CEO.

Happy Tax helps entrepreneurs meet the needs of today's increasingly tough regulatory requirements, without the burden of preparing taxes themselves, hiring costly staff or signing risky leases.

MORE INFORMATION

CEO Email: Mario@HappyTax.com

Franchise Information: <https://GetHappyTax.com>

Area Representative Information: <https://GetHappyTax.com/Area-Representative>

Consumer Information: <http://HappyTax.com>

Small Business Information: <http://HappyAccounting.com>

Tax Industry Strategy Sessions: <https://youtube.com/HappyTax>

ABOUT HAPPY TAX

Now shaking up the \$19 billion tax preparation industry, Happy Tax's disruptive model was born out of frustration with unreliable, under-qualified tax preparers with no licensing or certification and as little as five days of tax training. Happy Tax is designed to bridge the gap between the high quality, pampering, and convenient customer service that consumers want and accurate, reliable, and professional tax returns prepared by CPAs with a minimum of five years of training and experience. Happy Tax offers franchises, independent contractor relationships and Area Representative deals to those wanting to earn additional income and build their own business. Utilizing its patent-pending technology and processes, Happy Tax partners can operate with low overhead and increased flexibility.

ABOUT SANTA BARBARA TAX PRODUCTS GROUP

Founded in 1991, Santa Barbara Tax Products Group (TPG) became a Green Dot company in 2014. TPG serves consumers nationwide with tax-related financial products and services that provide value, are fairly priced and satisfy consumer need. TPG offers tax-related financial products through a network of tax preparation franchises, independent tax professionals and online tax preparation providers. TPG is located in San Diego, California.

CONTACTS

Investors: Ted Muftic

Chief Financial Officer

Ted@HappyTax.com

(844) 426-1040

Franchise and Area Rep Opportunities: Melissa Salyer

EVP of Business Development

Melissa@HappyTax.com

(305) 797-5574