

The  
**12-Step**  
Guide  
to



**Starting Your Own  
Immigration Consulting  
Business**



LATIN AMERICAN IMMIGRATION ASSOCIATION

# Introduction

Thank you for your interest in “The 12-Step Guide to Starting an Immigration Consulting Business”. I’m excited to share this guide with you because I know first-hand, how rewarding a career as an immigration consultant can be. I know this because I have had the privilege of personally training over 1,500 immigration consultants from all over the United States.

The goal of this guide is pretty simple... it is to help you to become **The Immigration Consultant That Everybody Wants.**

One of the best parts about starting an immigration consulting business is you don’t need any degrees or specific experience to get started. You will, however need specific training from a qualified expert to learn the skills and knowledge that will be required for you to confidently, ethically and legally offer professional services as an immigration consultant.

We can help you with many areas of getting started, including assistance with state regulations, training and education, ongoing support, trade association affiliation, immigration software, membership benefits, surety bonds, insurance, marketing, networking with other consultants, business development and much more.

If you would like to learn more about getting trained for this rewarding career, then please contact us directly at 855-558-8470 and speak with one of our Business Development Guides. You may also LEARN MORE by registering for our free LIVE TRAINING at [www.latinimmigration.org](http://www.latinimmigration.org)



Sincerely,

Greg Mckewen

Founder & CEO



# STEP #1

## Determine your state regulations

There are three main categories concerning state regulations for immigration consulting services.

- 1) States that allow providing “non-legal” immigration consulting services.
- 2) States that allow providing “non-legal” immigration consulting, but require a state registration process or other laws or statutes.
- 3) States that prohibit offering independent “non-legal” immigration consulting services

It is also important to know that different states use different terms to describe Immigration Consultants. Other terms include the following; Immigration Document Preparers, Immigration Assistance Providers, Legal Document Preparer and others.

If your state does require a registration process, then you **MUST** complete that REGISTRATION PROCESS and any SURETY BOND requirements PRIOR to offering services as an immigration consultant.

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### General Information on State Regulations:

#### States that require registration and posting a surety bond:

California  
Georgia  
Illinois  
Nevada  
New York  
Utah

## **States which have special requirements or restrict immigration consulting services**

**Arizona** - Requires immigration consultants to be certified as legal document preparers.

**Nevada** – Requires immigration consultants to be licensed as a document preparation service.

**Tennessee** – Prohibits notaries from representing themselves as immigration consultants unless the notary is accredited by the federal Board of Immigration Appeals.

**North Carolina** - Prohibits notaries from representing themselves as immigration consultants unless the notary is accredited by the federal Board of Immigration Appeals.

## **States which PROHIBIT offering non-legal immigration consulting services:**

**Oregon**

**Colorado**

**Texas**

**Washington**

Only licensed immigration attorneys, BIA accredited individuals or organizations, or immigration assistants or immigration paralegals working under the direct supervision of a licensed immigration attorney or law firm may offering immigration forms preparation services in these states. It is possible that other states could prohibit immigration consultants. Again, you must check with your state officials to determine the laws in your state.

### **Important note:**

If your state bans immigration consulting services, you may still take a training course for the following purposes:

To assist in obtaining employment working for an immigration attorney or immigration law firm as an immigration assistant or immigration para-legal.

To assist in obtaining employment working as an administrator or assistant for a BIA accredited individual or organization.

For informational purposes or to manage your own needs.

**Important Legal Disclaimer:** Information published in this guide and website are intended for informational purposes only. LAIA is not a law firm and we do not engage in providing legal advice.

**You are responsible to determine your own state requirements, statues and laws pertaining to immigration consulting services. LAIA assumes no responsibility for the accuracy of this informational guide on state requirements or any other items discussed. State requirements differ state by state and may change without notice.**

## Step #2

### **Get the proper training from a qualified organization**

Providing immigration consulting services does require specialized knowledge and training. As such, it is vital that you obtain training from a qualified organization and instructor. Invest in the highest quality training possible. Check the qualifications of the organization and instructors. Read any reviews that are available online or in social media communities such as Facebook or others. We recommend instructors that are immigration paralegals or equivalent or immigration attorneys with many years of experience under their belt. Check the curriculum of the training class. Be sure it is thorough and detailed. Getting the right training will provide you with a good foundation on which to start offering your services, but initial training will only be the start of your journey to becoming a competent and confident immigration consultant.

## Step #3

## **Complete state registration & obtain surety bond (where required)**

A number of states have a required “registration” process to become an immigration consultant. These requirements vary from state to state.

Additionally, some states require immigration consultants to have a surety bond. Again, this requirement can vary from state to state as well. Refer to our state laws for assistance regarding state requirements and surety bond information.

## **Step #4**

### **Join an industry trade association**

Joining an immigration industry trade association can be extremely helpful as an immigration consultant. Trade organizations should provide you with ongoing support, educational opportunities, resources, guidance, advocacy, networking opportunities and other valuable membership benefits.

## **Step #5**

### **Obtain Errors & Omissions and General Liability Insurance**

A surety bond does not protect you. It is designed for the protection of your client. This is why obtaining Errors & Omissions and General Liability Insurance is important so important. These protections are designed to protect both yourself and your clients. Do not underestimate the value and importance of this type of protection.

## **Step #6**

### **Decide on your business entity type**

Starting any new business will require you to decide on what business entity type makes the most sense for you and your business. There are many factors to consider, including liability issues, taxes and others important considerations. It's best to get some professional guidance from a qualified CPA or business attorney in making this determination.

## **Step #7**

### **Develop your business & marketing plan**

Your business and marketing plan should be done in writing and it should be a detailed plan. This will be a work in progress, but it is vital that you envision what your goals and objectives are in starting your new business. There are numerous books and software programs available to make the process of developing your business and marketing plan much faster and easier.

## **Step #8**

**Decide which Immigration Consulting Software will best serve your clients' needs**

The right Immigration Consulting Software is a very important step in setting up and running a successful immigration consulting business. There are a number of different software programs on the market. Ideally, you want a software program that will not just allow you to input client data, but one that will also help with some of the “heavy lifting”. The benefits of using an immigration software program include; more efficiency, accuracy, saves time, reduces mistakes, helps with recordkeeping, and provides the consultant with more credibility and professionalism from the client’s point of view. Software will also make your job easier and faster in terms of entering client intake information as well as populating and printing required USCIS forms. Software also helps to ensure that you are always using the most current and up-to-date USCIS forms which do tend to change frequently. We are happy to guide you on which software programs would be the best fit for you and your clients.

## **Step #9**

**Decide which forms you will offer and how to price your services**

There are many immigration forms that exist, many of which are not recommended or suitable for immigration consultants to offer. It is very important to offer the most common and typical forms offered by immigration consultants. Additionally, how to price your services will also be another very important consideration. Check the pricing of other consultants in your community to develop a fair pricing model.

## **Step #10**

### **Develop your client agreement**

Having a well thought out client agreement is VITAL to protecting both yourself and your client. In many states a client agreement is required by law. There are MANY items that are critical that should be included in your client agreement. Refer to your state regulations or feel free to reach out to LAIA for more information on client agreements.

## **Step #11**

### **Develop your branding, business cards, brochure, marketing materials, signage, Facebook page &**

## **website**

Developing great branding and marketing materials will be one of the most important series of decisions and work product that will help determine your success. There are many items to consider under this step, but it's critical that you hire the best experts you can afford to assist you in executing these important items.

## **Step #12**

### **Decide how you will attract & acquire customers to your business**

Attracting customers is another very important and critical element to your success. The better you are at attracting and acquiring customers, the more successful you will be and the more money you will make.

**Want to LEARN MORE about starting your own business as an Immigration Consultant?**

**REGISTER NOW**

**LIVE TRAINING WEBINAR**

WELCOME TO OUR WEBINAR  
**"Starting a Successful Immigration Services Business"**

Why the Time to Start is Now!



**NOW** more than **EVER**, Immigrants need Knowledgeable & Trusted Professionals

Presented by:

**The Latin American Immigration Association**

**REGISTER NOW**

**Meet LAIA Founder**  
**GREG MCKEWEN**

**-Immigration Crusader**

**-Community Advocate**

**-Founder & CEO**

# **Latin American Immigration Association**



## **Becoming An Immigration Crusader**

**By Greg Mckewen, LAIA Founder**

I remember the exact moment that I was bit by the “Immigration Bug”.

It was November 20<sup>th</sup>, 2014, and I was watching then President Barack

Obama delivering his nationally broadcast live speech detailing his Executive Actions for an immigration program named DAPA (Deferred Action for the Parents of American's). I was not familiar with DAPA, but the President's speech made sense to me, and I immediately began feeling extremely proud that our President had the courage to offer this temporary protection from deportation & work permit to more than 5 million of America's hard-working undocumented immigrant parents. He believed that tearing families apart through deportation is just un-American. I agreed, and still do.

The President's speech ignited a spark inside of me. That spark grew into a flame. That flame turned into a burning fire. That fire is my passion for helping immigrants and my passion for helping community trusted advisors and others to help their clients with valuable and needed immigration services.

## **The Spark**

In the days following the President's Speech I began reaching out to friends and colleagues of mine who serve their communities with insurance and tax preparation services. (I had developed a vast network of friends

and colleagues in these fields as a result of my background as the Founder and CEO of [Infinity Schools](#), one of the nation's largest providers of online continuing education and pre-licensing training courses for insurance and tax professionals). I began asking my colleagues about whether their clients were asking them with assistance on any matters pertaining to immigration. I found discovered this was common. I also discovered that many of my colleagues wanted to help their clients and community members with the DAPA application process. Only problem...they didn't know anything about immigration consulting or how to properly assist with the completion of immigration forms.

## The Flame

After my talks with friends and colleagues about their desires to learn how to become immigration consultants, I began to meet with some experienced immigration consultants and immigration attorneys.

I also began seeking out any schools or organizations that taught courses

on becoming an immigration consultant. I was becoming frustrated that I could not find any quality training programs for this industry. I wondered why it was so simple to find a training school to learn how to become an insurance, tax professional or real estate professional, but it was so difficult to find training to become an immigration consultant. I tried looking for an immigration consultants trade association and had no luck with this search either.

My frustration turned into my vision. That vision became the flame. The flame became founding America's first trade organization for the immigration consulting industry.

Our mission? Well there would be many. That many includes, keeping families together, being passionate advocates immigration reform, providing the best training on immigration consulting best practices, providing a membership program with valuable benefits, advocating on behalf of immigration consultants and uniting immigration consultants so that we may all network, learn and share from one another.

# The Fire

The fire is my intense passion to continue serving our students, our members, our communities and our industry with valuable training, education, support, advocacy, networking, tools and resource's for many years to come.

I am committed to share my knowledge, experience, leadership and vision to this exciting and rewarding career field of immigration consulting.

My sincere thanks to our many supporter, students, members and clients of our organization who are dedicated to “Keeping Families Together”.



**Become the Immigration Consultant  
Everybody Wants.**

**Get Trained Now**

**[www.latinimmigration.org](http://www.latinimmigration.org)**



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## Check out our 4.8 of 5 Stars Review on Facebook

4.8 ★

4.8 of 5 stars  
37 reviews

The screenshot shows the top portion of a Facebook page for the 'Latin American Immigration Association'. The page name is visible in the search bar. Below the navigation bar, there is a profile picture on the left which is the organization's logo: a stylized figure with arms raised, set against a background of the American flag, with the text 'LATIN AMERICAN IMMIGRATION ASSOCIATION' and 'UNIENDO FAMILIAS' below it. To the right of the profile picture is a large photo of a group of people holding certificates, similar to the images above. The page name 'Latin American Immigration' is also visible at the bottom left of the screenshot.

[Like our FACEBOOK Page to Get Access to Updates & Training!](#)



[Join our YouTube Channel  
and Get Updates and Access  
to Free Training!](#)



Latin American Immigration Association  
80 subscribers

CUSTOMIZE CHANNEL

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**Just a few of  
Immigration Crusader  
Success Stories!**



 **Hope Gutierrez** reviewed Latin American Immigration Association — ...  
5★  
October 22, 2016 · 🌐

Awesome training a lot to learn. Once I'm done with training I can go back and help my immigrants clients needs.

 Love  Comment  Share 

 **Rita Hernandez** reviewed Latin American Immigration Association — ...  
5★  
August 27, 2016 · 🌐

Patrick, Greg and Andres did an awesome job with teaching and providing information that is going to help so many people and families...#SISEPUEDE #PRESENTE

 Like  Comment  Share 

# Become the Immigration Consultant Everybody Wants.



# **Are you Ready?**

**REGISTER NOW**