

Gradient Tax:  
Direct CPA  
Access Program

# Gradient Tax

Model One of Four

## direct access to tax professionals

### Model One:



#### Direct Access

Develop relationships with tax professionals

#### Tax Toolkit

Dozens of marketing & prospecting tools

#### Accelerate Your Business

Discover a new source of qualified prospects

#### Access an elite team of CPAs and tax professionals.

We've assembled a team of CPAs and tax professionals to help you provide important and often overlooked tax information to your prospects and clients.

### Provide tax support to your clients and prospects

#### Direct Access to Tax Professionals

At Gradient Tax, we've designed a turn-key tax system that incorporates tax preparation services into your existing financial services practice and helps you market these services year round. Now, you can attract qualified prospects without the cost of adding a CPA or tax preparer to your staff. And, you can turn these same prospects into clients with our proprietary "what if" Tax Return Comparison and live support from our team.



## Take control of **your** prospecting

### Nick Stovall, CPA, MBA

Our team of CPAs and tax professionals is led by Nick Stovall, CPA, MBA.



Handpicked to serve as chief financial officer for Gradient Financial Group, LLC, Stovall boasts an extensive background in accounting, finance and investments. With over 20 years of experience, he brings decades of private industry accounting, public accounting, business taxation, IRA taxation, technical taxation, tax law and tax policy knowledge to the organization. Stovall also holds his series 7 and 66 as well as his life and health license. With an in-depth knowledge of the financial services industry and solid understanding of the complex demands of diverse business settings, his experience provides an

invaluable perspective on the intricate relationships between tax and business issues.

During his tenure in the private industry sector, Stovall served as the chief financial officer for Glenn Corporation and E Energy Adams. He has also consulted in the public sector serving individuals and businesses in the areas of financial and tax planning. Stovall was an instructor with National American University, teaching upper division accounting courses, and remains a mentor for aspiring accountants in the Twin Cities area.

Stovall earned the Masters of Business Administration in Accounting from the University of St. Thomas and a Bachelor of Science in Finance where he graduated with distinction. Nick has also attended Carlson School of Management at

the University of Minnesota for coursework in Masters of Business Taxation.

Stovall remains active in the accounting industry and is a member of the American Institute of Certified Public Accountants (AICPA), Minnesota Society of Certified Public Accountants (MnCPA) and the Institute of Management Accountants (IMA).

### Tax Toolkit

We have developed dozens of prospecting, marketing, and point-of-sale processes and tools that will drive sales to you. Our tax-specific marketing campaigns will broaden your prospecting arsenal and help you maximize your existing prospecting methods. Imagine using tax planning concepts in concert with your insurance and investments solutions!

### Accelerate Your Business

Here are the facts: your clients and prospects must file their taxes, and chances are someone is doing it for them -- 60 percent, in fact! You'll diversify your prospecting methods, uncover hidden assets from prospects and clients, and help people save money on their taxes. What's not to like about that?

## Tax Highlights



### **Top advisors rely on their clients' tax returns to generate new business.**

- Discover a new source for prospecting and identify areas to properly cross-sell new products.
- Direct access to CPAs and tax preparers.
- Diversify your business while feeding your primary source of revenue.