

Gradient Tax:
Direct CPA
Access Program

Gradient Tax

Hybrid Model **One** of Four

build your tax practice with our team of experts

Hybrid Model One:



Direct Access

Utilize Gradient's elite team of CPAs and tax professionals

Tax Toolkit

Dozens of marketing & prospecting tools

Accelerate Your Business

Discover a new source of qualified prospects

Build an Additional Revenue Stream

Share in the profits from tax preparation

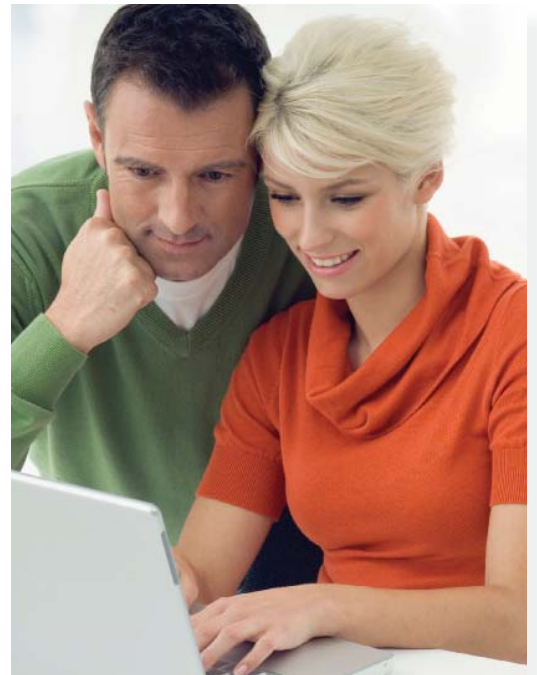
Why hire and manage your own team when our established team will do all the work for you?

Access our elite team of CPAs and tax professionals to build your own tax practice.

Provide tax support to your clients and prospects

Direct Access to Tax Professionals

At Gradient Tax, we've designed a turn-key system that incorporates tax preparation services into your existing financial services business. We will help you establish your own tax practice, market your business, and build a separate stream of revenue, marketing these services year round. Now, you can attract qualified prospects and provide additional services to existing clients without the cost of adding a CPA or tax preparer to your staff. You will have the ability to turn prospects into clients with our proprietary Second Opinion Tax Return Comparison and receive live support from our elite tax team.



Take control of your prospecting

Nick Stovall, CPA, MBA and Senior Tax Strategist

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

Handpicked to serve as Chief Financial Officer and Senior

Tax Strategist for Gradient Financial Group, LLC, Nick Stovall boasts an extensive background in accounting, finance and investments.

Nick oversees Gradient Tax, LLC 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. He 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, Nick 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. Nick was an instructor with National American University, teaching upper division accounting courses, and remains a mentor for aspiring accountants in the Twin Cities area.

Nick earned the Masters of Business Administration in Accounting from the University of St. Thomas and holds

a Bachelor of Science in Finance. He is currently pursuing a Masters of Business Taxation from the Carlson School of Management at the University of Minnesota.

Nick 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, build an additional stream of revenue, 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
- Gain direct access to CPAs and tax professionals
- Diversify your business while feeding your primary source of revenue
- Add an additional stream of revenue and reduce the cost of client acquisition

Maintenance

Model One of Four

Model One:



Turn-key Start Up

Entity formation
Limited Liability Company, S Corporations, etc.

Group E&O policy
1-page signature enrollment

E-mail disclosure form

Legal Documents and Agreements

Gradient Tax
Program Agreement

Client Privacy Policy
and Consent Form

Client Engagement
Agreement

Client Memorandum

Pricing: Affiliated

Option 1

Setup \$500 (reimbursable)
Maintenance \$100 month

Option 2

Setup \$0
Maintenance \$125 month

Pricing: Unaffiliated

Setup \$1000
Maintenance \$200 month

Services

Tax Preparation Varies/Call for details
Second Opinion - Individual \$30
Second Opinion - Business \$200

Media

- Postcards (6), Discount Certificates (8), Client Approach Letters (5) Printing / postage
- Newspaper Ads (4) Rate charge
- Seminars (7) Event charge
- Corporate Identity Sets Printing / postage
 - > *Letterhead – Envelopes – Business Cards – Tax Return Delivery Folders*
- Co-op Advertising and Purchasing (affiliated producers only)
- Monthly E-Newsletter, Referral Program
- Branding Program (Logo design, other marketing) Prices starting at \$25

Technical Support

- 2 Hr. / Month Tax Question Support
 - > Additional Hours:
 - Affiliated \$165 hour
 - Unaffiliated \$225 hour
 - Unlimited (add to monthly base fee) \$50 month
- Monthly Webinar on Practice Management, Marketing and Current Tax Issues
- Technical Return Support
- Marketing Accountability Plan
- Tax Talk Kit and 1040 Analyzer
- Personal Tax Reduction Report

Practice Management and Branding Support

- Member Access Gradient Tax Site
- Consolidated Advisor
 - Advisor \$100 month
 - Administrative / Assistant \$50 month
- Web site Development \$495 design charge
- Web site Maintenance and Hosting, Prices starting at \$50
- Internet Search Engine Optimization Program Prices starting at \$50
- Territory and Zip Code Management