

Gradient Tax:  
Total Tax and  
Financial Services  
Platform

# Gradient Tax

Model Four of Four

## expand your practice by offering tax services

### Model Four:



#### Build an Integrated Tax Practice

Diversify your business

#### Tax Toolkit

Seminar system, fact  
finders & more

#### Generate More Profit

Uncover all your clients'  
assets

#### Training & Support

Hands-on training from  
tax experts

What if your clients could get their insurance, investments and tax services from one place? Would they prefer that, or would they prefer passing out their *private* information to multiple professionals? Obviously, most people would say, “the fewer the better.” When you work with Gradient Tax, that “few” will be you. We help financial services professionals, like you, expand their practices by offering tax preparation services to their clients.

By owning a separate, yet integrated tax preparation business, you’ll be able to drive down your prospecting costs and generate more profit. And contrary to what you might think, it’s not rocket science!

### Add true value to your existing clients

#### Build an Integrated Tax Practice

Build it, and they will come. Sixty percent of people pay someone every year to prepare their taxes. If your clients are already paying someone, why shouldn’t that check be written out to you? We’ll show you how to own and operate your own tax preparation business. From establishing the business to finding a preparer to do the tax returns (*no, that won’t be you!*) to giving you



the tools you need to make the phone ring, we have you covered. The key to your success is to build a separate, yet integrated, tax business. This enables you to bolster your prospecting and add true value to your clients.



## Take control of **your** prospecting

### Tax Toolkit

We have everything you need to run a successful tax practice.

We offer a complete seminar system, fact finders, pricing strategies, signage and more. We even give you access to one of the nation's best tax preparation software packages. Additionally, we have developed dozens of prospecting, marketing, and point-of-sale processes and tools that will drive sales to you.



Most tax preparers record history, and therefore, it's typically too late to improve the clients' tax situations. With Gradient Tax, you can help your clients make history by reducing the amount of taxes they pay.

Our **1040 Analyzer** will help you dissect clients' tax returns, save them money, and position your tax business as a value-added extension of your advisory practice.

Our tools will help you identify proper cross-selling opportunities and uncover all of your clients' assets.

### Generate More Profit

By increasing your revenue per client and decreasing your prospecting costs, you will not only generate more revenue, you'll keep more of it! The Gradient Tax approach will help you to diversify your business while feeding your primary sources of revenue, insurance and investments. You'll have a stronger business model and increase the value of your business through recurring revenue.

## Training and Support

We have one of the best training programs in the country and can help a tax novice become a veteran. Our partnership with one of the nation's best tax support companies delivers first-class, hands-on training. We'll keep you informed of changing tax laws and taxpayer initiatives, teach your tax preparer how to read and understand tax returns, and deliver a series of ongoing training webinars to support your growth. Our tax support team is also available for tax questions and virtual hands-on assistance through desktop sharing.

## 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.
- Own and operate a tax practice, and hire a preparer to do the tax returns.
- Access to one of the nation's best tax preparation software packages to process tax returns.
- Professional support team available for tax questions and virtual hands-on assistance through desktop sharing.