

The **Direct CPA Access Program** provides a turn-key program to market tax preparation services year round and instant access to a team of CPAs and tax professionals. Attract qualified prospects using our proprietary tax return comparison and benefit from our live support team of tax professionals.

Base Fees

Affiliated	\$100 month
Unaffiliated	\$200 month

Media

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

Technical Support

• 2 Hr. / Month Tax Question Support > Additional Hours:	
Affiliated	\$165 hour
Unaffiliated	\$225 hour
Unlimited (add to monthly base fee)	\$50 month

- Gradient Tax Advisor FX
- Monthly Webinar on Practice Management, Marketing and Current Tax Issues
- Technical Return Support
- Marketing Accountability Plan
- Tax Talk Kit
- 1040 Analyzer
- Gradient Tax Found Money 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	

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