

# Maintenance

Model Two of Four

## Model Two:



### Turn-key Start Up

Entity formation  
*Limited Liability Company,  
S Corporations, etc.*

Group E&O policy  
*1-page signature  
enrollment*

Life and health licensing  
*Materials, classrooms,  
and exam scheduling*

Commercial tax software

Optional computer lease

E-FIN set up - Form 8633

E-mail disclosure form

### Legal Documents and Agreements

Tax Preparer and  
Financial Services Affinity  
Program Agreement

Gradient Tax Affinity  
Program Agreement

Relationship Finder  
Agreement

Client Privacy Policy and  
Consent Form

Preparer Disclosure  
Document

Client Engagement  
Agreement

Client Memorandum

Referrals are great. Referrals from professionals are even better. With our **Direct Referral Relationship Program**, you'll partner with a tax professional, open the door to new referral prospects, have a better understanding of your clients' financial situations, and increase your sales per client. It's no secret, top producers rely on their clients' tax returns to generate new business.

### 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	