

Model Four:



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

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? Most people would say, "the fewer the better." With the **Total Tax and Financial Services Platform**, that "few" will be you. We help you expand your practice by offering tax preparation services to your clients.

Base Fees

Affiliated	\$150 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

• 5 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	Per return charges
• 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	