

# Confidential Application for Platinum Membership

June 1, 2022 – May 31, 2023 Cohort



## Contact information

Today's Date: _____	Phone: _____
Name: _____	Email: _____
Company name: _____	Website: _____
Address: _____	Check all that apply:
City: _____	____ CPA    ____ EA    ____ Attorney
Zip: _____	____ Other _____
Country: _____	____ Other _____
Number of staff: _____	Other owners: _____

1. Please tell us about you

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2. Please describe your business as it is right now.

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3. Briefly describe why you are a good candidate for the Platinum program.

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4. If you could wave a magic wand and change three things in your business or life over the next six months, what would they be?

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5. What is your long-term vision for your company – and you?

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6. Who or what do you think is your biggest obstacle in reaching your current goals?

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7. Who is or has been your role models?

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8. Who or what do you think is responsible for your current results?

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9. What motivates you?

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10. Anything else you would like to share with us when considering you for this program?

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11. Please check your approximate gross business revenue for each of the indicated years.  
(Please note this is completely CONFIDENTIAL.)

2022 (forecasted):

<input type="checkbox"/> less than \$50K	<input type="checkbox"/> \$50K - \$100K	<input type="checkbox"/> \$100K - \$250K
<input type="checkbox"/> \$250K - \$500K	<input type="checkbox"/> \$500K - \$1 million	<input type="checkbox"/> \$1 million +

2021:

<input type="checkbox"/> less than \$50K	<input type="checkbox"/> \$50K - \$100K	<input type="checkbox"/> \$100K - \$250K
<input type="checkbox"/> \$250K - \$500K	<input type="checkbox"/> \$500K - \$1 million	<input type="checkbox"/> \$1 million +

2020:

<input type="checkbox"/> less than \$50K	<input type="checkbox"/> \$50K - \$100K	<input type="checkbox"/> \$100K - \$250K
<input type="checkbox"/> \$250K - \$500K	<input type="checkbox"/> \$500K - \$1 million	<input type="checkbox"/> \$1 million +





12. How many IRS tax returns (include amended) do you file for clients in any one year?

Number of individual returns \_\_\_\_\_ Number of corporate returns \_\_\_\_\_

Number of partnership returns \_\_\_\_\_ Number of estate/gift returns \_\_\_\_\_

Number of nonprofit returns \_\_\_\_\_ Number of payroll tax returns \_\_\_\_\_

List any other significant IRS area such as excise, expat, etc: \_\_\_\_\_

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13. How many tax representation clients do you currently handle in any one year?

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14. What types of tax representation clients and remedies have you served in the past?

\_\_\_ Collections                      \_\_\_ Nonfilers                      \_\_\_ Payroll Tax

\_\_\_ Offers in Compromise        \_\_\_ Installment Agreements    \_\_\_ Audits / Exams

\_\_\_ Criminal                        \_\_\_ Other \_\_\_\_\_

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15. Please check your approximate gross business revenue from tax representation only for each of the indicated years. (Please note this is completely CONFIDENTIAL.)

2022 (forecasted):

\_\_\_ less than \$50K                      \_\_\_ \$50K - \$100K                      \_\_\_ \$100K - \$250K

\_\_\_ \$250K - \$500K                      \_\_\_ \$500K - \$1 million                      \_\_\_ \$1 million +

2021:

\_\_\_ less than \$50K                      \_\_\_ \$50K - \$100K                      \_\_\_ \$100K - \$250K

\_\_\_ \$250K - \$500K                      \_\_\_ \$500K - \$1 million                      \_\_\_ \$1 million +

2020:

\_\_\_ less than \$50K                      \_\_\_ \$50K - \$100K                      \_\_\_ \$100K - \$250K

\_\_\_ \$250K - \$500K                      \_\_\_ \$500K - \$1 million                      \_\_\_ \$1 million +





The Platinum program requires a 12-month commitment. Please choose your payment plan

Option 1: \_\_\_\_ Pay \$15,000 in full upon acceptance (save \$1,000).

Option 2: \_\_\_\_ Pay three equal monthly installments of \$5,250 (save \$250).

Option 3: \_\_\_\_ Pay four equal monthly installments of \$4,000.

Print name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Email your completed agreement to: [egreen@gs-lawfirm.com](mailto:egreen@gs-lawfirm.com) .

Thank you for your application.

If you are accepted, you will be asked to sign a coaching agreement and a confidentiality agreement as well as arrange payment.

Tax Rep LLC  
New Haven, CT 06511  
<https://taxrepllc.com>

