Confidential Application for Platinum Membership

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

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

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

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

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1. Who is or has been your role models?

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

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1. What motivates you?

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

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

2020 (forecasted):

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

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

2019:

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

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

2018:

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

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

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

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

2020 (forecasted):

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

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

2019:

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

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

2018:

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

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

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The Platinum program requires a 6-month commitment. Please choose your payment plan

Option 1: \_\_\_\_ Pay $7,500 in full upon acceptance (save $500).

Option 2: \_\_\_\_ Pay two 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>

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