

Confidential Application for Platinum Membership



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

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

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





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?

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

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

7. Who is or has been your role models?





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

9. What motivates you?

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

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

2020 (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 +

2019:

<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 +

2018:

<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: _____

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

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 _____

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

2023 (forecasted):

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

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

2022:

___ 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 +





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

Option 1: ____ Pay \$9,950 in full upon acceptance (save \$350).

Option 2: ____ Pay two equal monthly installments of \$5,150

Print name: _____ Date: _____

Signature: _____

Email your completed agreement to: 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>

