



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 yourself.

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

3. Briefly describe why you believe 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. Are there any particular projects you have wanted to launch? If so, what is it/what are they?



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.)

2024 (forecasted):

| | | |
|---------------------|--------------------------|---------------------|
| ___ less than \$50K | ___ \$50K - \$100K | ___ \$100K - \$250K |
| ___ \$250K - \$500K | ___ \$500K - \$1 million | ___ \$1 million + |

2023:

| | | |
|---------------------|--------------------------|---------------------|
| ___ 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 + |



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.)

2024 (forecasted):
___ less than \$50K ___ \$50K - \$100K ___ \$100K - \$250K
___ \$250K - \$500K ___ \$500K - \$1 million ___ \$1 million +

2023:
___ 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 +



Note to Applicants

Any Master Mind Group only works if all members are attending and engaged. We will be fully engaged with you to try and help you get your practice to the next level and/or launch that project you have been thinking about. The Platinum program requires a 12-month commitment. Please choose your payment plan. If you are an existing TRN Member, the Master Mind membership fee is in lieu of your normal membership fee, which will be suspended for the duration of 2025 while you are a member of the Master Mind group.

Option 1: ____ Pay \$18,500 in full upon acceptance (save \$1,750).

Option 2: ____ Pay two equal monthly installments of \$9,500 (save \$1,250).

Option 3: ____ Pay three equal monthly installments of \$6,750.

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>