

| Your Firm Profile

1. What do we want to improve in the next 12 months?
2. What would the total impact be?
3. What's Your biggest roadblock now?
4. When do you want to implement/invest in your progress?
5. Next Steps – Enroll and book kickoff call.

The proven
Framework to
**increase
margins**
in a small firm



Premium Margins RoadmapSM

1

Identify

Where are you now? What's your current growth phase?

2

Measure

How much revenue do you want to generate?

3

Price

What you offer controls your price.

4

Help

Get the right clients to raise their hands for Help.

5

Deploy

Get clients your education materials.



Premium Margins RoadmapSM

95% of the work is done for you.



Clients Service Packages


Done for you

- ✓ Up to 8-Core Packages (Business & Individual)
- ✓ Custom Features & Benefits based on new & existing ideal clients.
- ✓ Optimized Package names, structure, & all details based on 12+ years of small firm data.



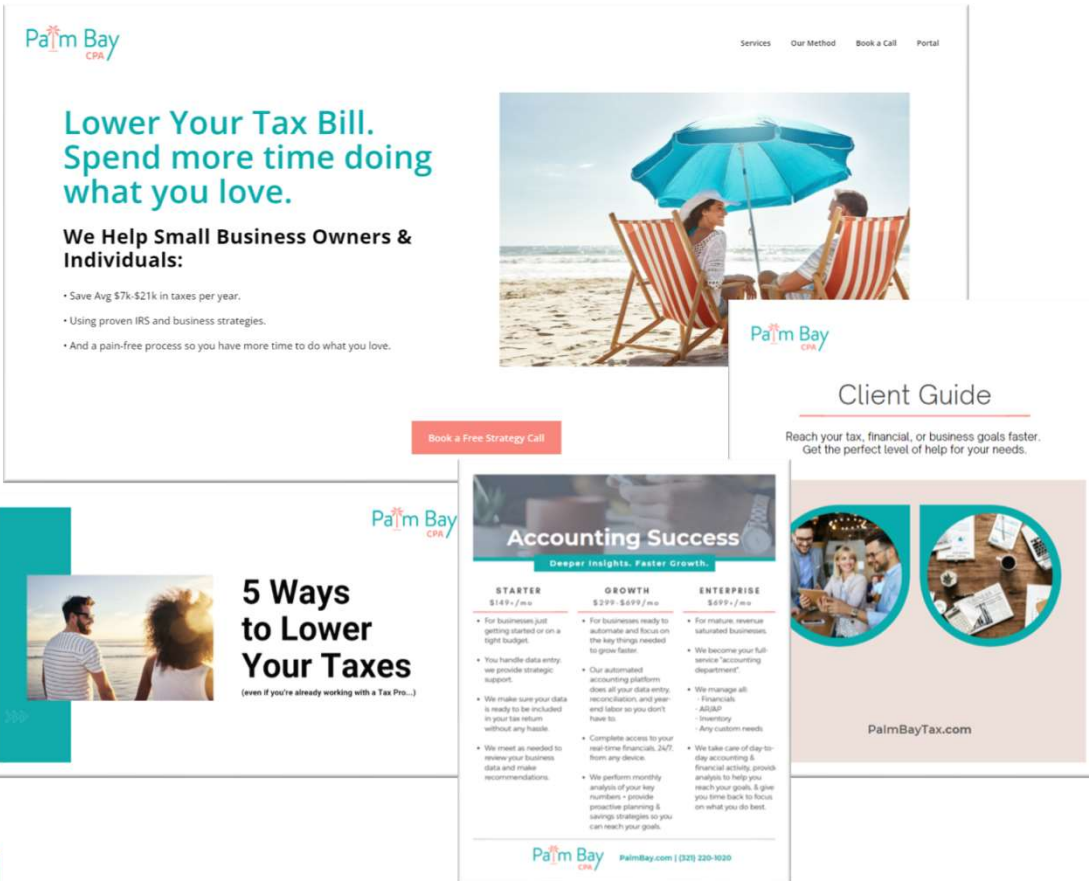
Optimized Package Menu

 Business Packages	 Individual Packages
<input type="checkbox"/> 1. New Business Incubator * <ul style="list-style-type: none">- Entity Formation- Strategic Planning & Analysis- Business setup	<input type="checkbox"/> 6. Personal Bundle * Includes: <ul style="list-style-type: none">- Tax Preparation & Filing- IRS Correspondence Assistance- Year-Round Planning Value
<input type="checkbox"/> 2. Business Bundle * <ul style="list-style-type: none">- Tax & Year-Round Planning Value- Accounting Package Value- Payroll Package Value	7. IRS Rapid Relief <ul style="list-style-type: none">- IRS Resolution bundle (business or personal)
<input type="checkbox"/> 3. Business Tax & Advisory (no accounting or payroll)	<input type="checkbox"/> 8. Reporting Only Package <ul style="list-style-type: none">- Individual or Business Tax Prep & filing without strategic planning.- Accounting or Payroll reporting without strategic planning.
<input type="checkbox"/> 4. Accounting Success (stand alone)	
<input type="checkbox"/> 5. Payroll Success (stand alone)	

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Premium Margins RoadmapSM

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Lower Your Tax Bill. Spend more time doing what you love.

We Help Small Business Owners & Individuals:

- Save Avg \$7k-\$21k in taxes per year.
- Using proven IRS and business strategies.
- And a pain-free process so you have more time to do what you love.

Client Guide

Reach your tax, financial, or business goals faster. Get the perfect level of help for your needs.

Accounting Success
Deeper Insights. Faster Growth.

STARTER	GROWTH	ENTERPRISE
\$149+/mo	\$299-\$699/mo	\$699+/mo
<ul style="list-style-type: none"> • For businesses just getting started or on a tight budget. • You handle data entry - we provide strategic support. • We make sure your data is ready to be included in your tax return without any hassle. • We meet as needed to review your business data and make recommendations. 	<ul style="list-style-type: none"> • For businesses ready to automate and focus on the key things needed to grow faster. • Our automated accounting platform does all your data entry, reconciliation, and year-end labor so you don't have to. • Complete access to your real-time financials, 24/7, from any device. • We perform monthly analysis of your key numbers + provide proactive planning & savings strategies so you can reach your goals. 	<ul style="list-style-type: none"> • For mature, revenue saturated businesses. • We become your full-service "accounting department". • We manage all: <ul style="list-style-type: none"> - Financials - AD&P - Inventory - Any custom needs. • We take care of day-to-day accounting & financial activity, provide analysis to help you reach your goals, & give you time back to focus on what you do best.

5 Ways to Lower Your Taxes
(even if you're already working with a Tax Pro...)

Client Education

Done for you

- ✓ Fully designed Digital Client Guide, Package PDF's, & Firm eBrochure.
- ✓ Fully designed and deployed website & brand optimization.
- ✓ Simple Client Referral System.



Premium Margins RoadmapSM

95% of the work is done for you.

Pricing & Proposals

Done for you

- ✓ Customized pricing for each package based on your specific revenue goals.
- ✓ Client Proposal System so you can engage clients without selling.
- ✓ Training for all staff on the SmartPath Proposal Generator.



The screenshot displays the SmartPath software interface for configuring a 'Business Bundle'. The interface includes a sidebar with navigation options: 'Find Events', 'Client Information', 'Package Overview', 'Package Customization', 'New Business Evaluation', 'Business Details', 'Business Tax & Advisory', 'Roadmap Customization', 'Pricing', and 'Roadmap'. The main content area is titled 'Business Bundle' and includes a 'National Average Price' of '\$300-\$3,000+ / per month'. A 'Value Margin' section shows a value of '\$250'. The 'Payment Terms' section lists various options for client payment, including 'All Up Front', 'Quarterly', 'Monthly Subscription', and 'Half & Half'. A 'Save & Continue' button is located at the bottom right.

Include in Roadmap?	Include in Price	One-Time Fees	Monthly Time & Expertise	Units

Value Margin	Total Recurring
\$250	\$0.00
	Total One-Time
	\$2,543.00
	Total Fees
	\$2,543.00

How do you want the client to pay?	Price	Units	Rate	Term
<input checked="" type="checkbox"/> All Up Front	\$3,543.00	1 Fee Fee		
<input type="checkbox"/> Quarterly	\$3,543.00	1 Fee Fee		
<input type="checkbox"/> Monthly Subscription	\$3,543.00	1 Fee Fee		
<input type="checkbox"/> Monthly Subscription + Custom 3-Time Enrollment	\$3,543.00	1 Fee Fee	\$125.75	month
<input type="checkbox"/> Annual Subscription + Custom 1-Time Enrollment	\$3,543.00	1 Fee Fee	\$45.25	month
<input checked="" type="checkbox"/> Half & Half	\$3,543.00	1 Fee Fee	\$125.75	month
<input type="checkbox"/> Upfront Fees + Monthly Subscription	\$3,543.00	1 Fee Fee	\$125.75	month

Premium Margins Roadmap SM

95% of the work is done for you.

Include in Proposal	Step Details	Tools	Assignee	Status	Notes
<input type="checkbox"/>	1 Set up Discovery Meeting	Acuity Scheduling	Everyone	Complete	Discovery
<input type="checkbox"/>	2 Hold Discovery Meeting	Package Discovery Meeting Template Training Video	Me	Complete	Discovery
<input type="checkbox"/>	3 Create Proposal Roadmap	Client Resultst Template (CRT) Training Video	Staff	Complete	Discovery
<input type="checkbox"/>	4 Review Roadmap & Commit, Nurture, or Decline	Proposal Roadmap Template Training Video	Me	Complete	Discovery
<input type="checkbox"/>	5 Complete Onboarding Paperwork	HelloSign Walk-Through Video Onboarding Templates	Staff	Complete	Onboarding
<input type="checkbox"/>	6 Process Payment	CPACharge Walk-Through Video	Client	Complete	Onboarding
<input checked="" type="checkbox"/>	7 Accounting Platform Setup/Conversion	Internal Process QBO/Xero/Bench	Staff	To Do	Starter
<input checked="" type="checkbox"/>	8 Ongoing Accounting Data Review & Maintenance	Internal Process QBO/Xero/Bench	Me	To Do	Starter
<input checked="" type="checkbox"/>	9 Full Accounting Platform Management	Internal Process QBO/Xero/Bench	Staff	To Do	Growth
<input checked="" type="checkbox"/>	10 Automated Monthly Transaction Reconciliation	Internal Process QBO/Xero/Bench	External	To Do	Growth
<input checked="" type="checkbox"/>	11 Custom Reporting Creation & Analysis	Internal Process QBO/Xero/Bench	Staff	To Do	Growth
<input type="checkbox"/>	12				
<input type="checkbox"/>	13				
<input type="checkbox"/>	14				

Welcome Email Template

Send this email as soon as someone gives you a Bundle package.

Hey [client name],

As soon as we complete the following steps, you will be Business Bundle process!

1) We'll need you to review & e-sign the following:

- Terms of Service Agreement (explaining)
- IRS Disclosure (required by the IRS)
- Tax Preparation Agreement (covering us)
- Payment Authorization form (allowing us)

2) As soon as we receive your e-signature on these our kick-off meeting.

3) During our meeting, we will begin mapping out your goals - including:

- What immediate issues need to be addressed
- Reviewing any potential threats that can be avoided
- How to optimize the key areas of your business to increase cash flow.

***We'll expect to receive your e-signature on the page, don't see anything by then, we'll reach out and see if we can help.**

[Signature & Contact Info]

James & Linda Smith | Net Worth Report

Your net worth is a summary of how much you own, versus how much you owe. When you own in loans, credit cards, and other debts, from what you own in your bank accounts, IRAs, and the value of your other assets, that number is your Net Worth. Your Net Worth is the most accurate measure of how you're doing financially.

There are two main numbers we track and manage regarding your Net Worth: Your **Net Worth** and Your **Net Worth Growth Rate**.

Together, we will track and manage these numbers over time. Understanding these numbers specific actions we can take as part of your year-round planning that will help you move closer to your goals.

Net Worth Summary	
As of 3/22/2022 you currently own assets that total:	\$776,500.00
As of the same date, your liabilities (what you owe) total:	\$460,500.00
That means that your current Net Worth is:	\$316,000.00

Your Net Worth number is usually not objectively "bad" or "good". It's based off of decision past. Generally, however, the **Higher** is the better.

Net Worth to Reserves Value

Your Net Worth Shows you how much "breath" you have accumulated to help achieve your goals funding your passion, leaving a legacy for loved ones, or simply saving for a future event. If your long term goals are, you should have a high-enough Net Worth to cover your needs if unforeseen circumstances arise. Your **Net Worth to Reserves Value** you shows you how reserve income your net worth represents.

Your current Net Worth to Reserve Value equals: 36 Months worth of your

Based on our other work together, we'll identify how many months worth of reserves you'll liquid accounts, versus how much you can feel safe to deploy in other ways to help fund your goals.

Net Worth Growth Rate

Your Net Worth growth rate shows how much your wealth has grown since the last time you calculated.

Your previous Net Worth amount was **\$295,000.00**

That means since your last calculation, your Net Worth has increased by **4.88%**. This represents a percentage change of **4.88%**.

Strategic Delivery Systems

Done for you

- ✓ Detailed Workflow Outline for Each Package.
- ✓ Year-Round Strategic delivery Tools & Workbooks.
- ✓ Client onboarding templates, legal agreements, & disclosure examples.



Pricing

Level-1

\$2,495 + \$95/month

**Cancel anytime.
No long term contracts.**

For any size firm ready to increase margins.

- ✓ Done-for-You Client Services Menu
- ✓ Done-for-You Client Education Materials
(Client Guide, Package PDFs, Referral System, & Website Blueprint)
- ✓ Pricing & Proposals Tool Kit & Training
- ✓ Strategic Advisory Training, Tools, & Templates
- ✓ Three 1-on-1 Coaching Sessions

Level-2

\$925/month + 12% Revenue Share

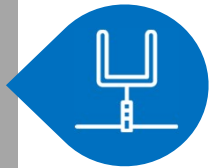
**12-Month Initial Engagement.
\$20,000+ monthly revenue goal.**

For mature firms ready to automate & outsource growth.

- ✓ Your firm gets Strategic Advisory Certified
- ✓ We attract clients for you
Custom Branding, Website, Marketing Materials, & **New leads Funnel**
- ✓ We help you convert clients
Lead tracking, proposal system, custom pricing, automated onboarding
- ✓ We help you track & manage your revenue
Automated Recurring Payments & On-going Growth Recommendations
- ✓ Year-Round Dedicated Support

How it works

Implement Premium Revenue Flywheel within 90 days with 1-on-1 implementation.



1 | Kickoff Call (Week 1)
1-on-1 call to cover everything needed to get started.



2 | Fundamentals Training (Week 1)
Learn your packages, proposal process, and delivery frameworks.



3 | First-Five Clients (Week 2)
Increase margins with five clients within 30-days for an immediate ROI.



4 | Website & Marketing Library Deployment (Week 3 & 4)
We copyright, design, customize, & deploy your new website and marketing materials.



5 | Scale (within 90 days)
Build out your fulfillment systems so you can increase margins at scale.



>> Enroll at smarpath.co <<

Limited Access. First come first serve.