

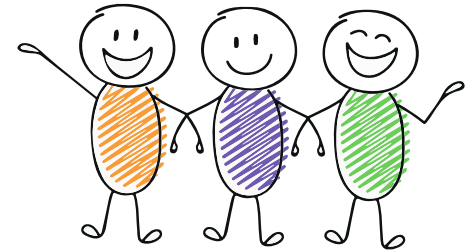
# Elevate RIA Tax Solutions

Providing white label tax services for your clients



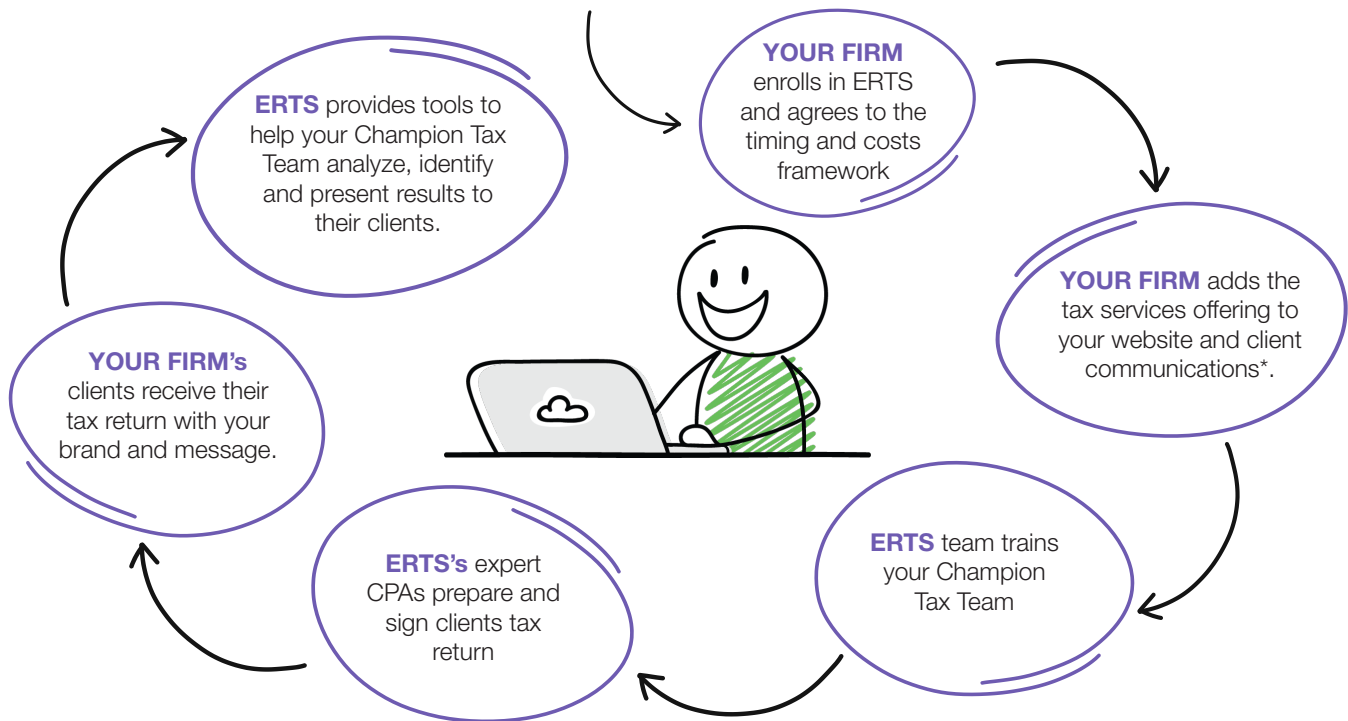
## Your brand. Your voice. Your firm.

Elevate RIA Tax Solutions (ERTS) helps you easily add U.S. based tax preparation and review services to your practice. We provide your firm with a white label tax practice that can help you retain and win new clients. Our team of accounting professionals work with your firm to manage clients by adding value to your family services offering.



## How it Works

ERTS provides the back office to simplify and manage your firm's tax practice efficiently and cost effectively:



*\*ERTS will provide marketing language to outline our tax services. Deviations to this content will require our approval to ensure legalities.*

## Expert Service. Affordable Solution.

ERTS allows your RIA firm to leverage the knowledge of our seasoned professional tax team versus a team of in-house CPAs. The ERTS model removes the costly investment for your firm to provide these services including but not limited to: hiring CPAs, software, training, licensing and overhead.

Taxes are inevitable for everyone – give your clients the tax services they need and want from their trusted investment professionals. **Contact the ERTS team to learn more about offering your clients tax services.**



[info@elevatecpagroup.com](mailto:info@elevatecpagroup.com)

303-444-9264

[elevatecpagroup.com](http://elevatecpagroup.com)

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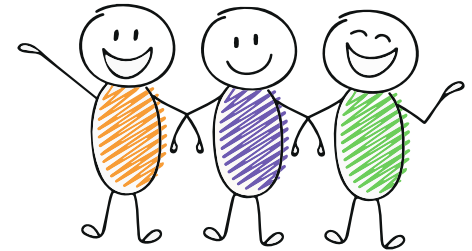










## The Right Fit

Our goal is to help you identify the right clients for this service. Occasionally a client's tax situation may exceed the parameters listed below. Together, we can determine the best value-added solution for your loyal clients.

### GREAT FIT: Client Tax Return Attributes:

ERTS is committed to providing high quality tax services to your clients. Therefore, your clients are a **right fit** if any or all of the following apply:



 W-2 Income	 Retirement Income	 Unlimited consolidated 1099s, 1099-INT, and 1099-DIV*	 Schedule A and above-the-line deductions*	 1 Schedule C or Schedule F*	 Up to 4 rental properties*	 Up to 6 K-1s*	 Up to 2 state returns
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*\*Some investments may require additional forms and disclosures that would incur an additional cost*

## The Commitment

Our CPA firm's reputation is the result of years of knowledge and expertise focused on the financial services industry. While we are grateful for our position amongst RIA firms, we also realize that trust is at the forefront of the services we provide just like you and your firm. As such, our firm strives to find like-minded RIA firms to provide our ERTS services. Therefore, we have outlined our commitment to your firm and ask for your commitment in return.

### ERTS Commitment to Your RIA Firm

#### ERTS will:

- Provide a high-quality tax service to your 'right fit' clients
- Offer and share our expertise to educate and empower financial professionals
- Provide our services under your firm's brand and never attempt to poach
- Not work with RIA firms that have dissimilar values and goals
- Provide training and support to make your RIA firm's tax practice a success
- Clearly communicate with your firm's Champion Tax Team

### YOUR FIRMS Commitment to ERTS


#### YOUR FIRM will:

- Have a desire to provide more value to your clients through tax services
- Identify an internal Champion Tax Team and adhere to our training schedule and expected requirements
- Take ownership of the process and commit to effective communications with your clients
- Provide clear communication and feedback to ERTS



Contact ERTS to learn more about providing your clients tax services today

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