



TAX OFFICE & ASSOCIATES™

We Make Taxes EZ . . . Because It's Your Money™

1-2-3 EZ TAX ASSOCIATE™

WE MAKE STARTING A TAX BUSINESS EZ . . . BECAUSE IT'S YOUR MONEY!

Congratulations on taking the first step towards financial independence. You are joining an exciting team of tax professionals striving to always think of others first, to always go the extra mile, and to always be excellent.

Tax Office & Associates™ is leading the way by putting the personal tax professional back into the retail tax services industry.

1

CHOOSE YOUR ASSOCIATE LEVEL

ASSOCIATE 1

- Tax Clerk Independent Contractor
- No State Certification Required
- PTIN Required
- No EFIN Required
- 50% Commission
- No Franchise Fee

ASSOCIATE 2

- Tax Preparer Independent Contractor
- State Certification Required CA, CT, IA, IL, MD, NV, NY, OR; or
- 3 years experience where no State Certification Required
- PTIN Required
- No EFIN Required
- \$89 Fee Per Filing without EFIN
- \$49 Fee Per Filing with EFIN
- 5% Franchise Fee

ASSOCIATE 3

- Branch Franchise
- Enrolled Agent License Required
- PTIN Required
- EFIN Required
- 5% of Annual Volume Royalty Fee

2

CHOOSE YOUR PAYMENT PLAN

ASSOCIATE 1

- Tax Clerk Fee = \$299
 - \$119 Down, and
 - \$15 Monthly; or
 - \$149.50 Bi-Annually

ASSOCIATE 2

- Tax Preparer Fee = \$499
 - \$139 Down, and
 - \$30 Monthly; or
 - \$249.50 Bi-Annually

ASSOCIATE 3

- Branch Franchise Fee = \$1,499
 - \$299 Down, and
 - \$100 Monthly; or
 - \$749.50 Bi-Annually
- 5% of Volume Royalty Fee
 - Monthly Volume
 - Bi-Annual Volume
 - Annual Volume

3

OPEN FOR BUSINESS

Tax Office & Associates™ believes the key to success is not only having a plan, but also having a dream. We provide the plan and tools you need. You provide the dream. Always put others first; always go the extra mile; and always be excellent and you will succeed. Our core value is to improve the lives of the people we serve.

ONBOARDING

- Independent Contractor Agreements
- Company Brand and Values
- Office Tools & Services

TRAINING

- Tax Software Training: Online Course
- Bank Products
- Accepting Payments Procedures

MARKETING

- 1-2-3 EZ Tax Approach™
- 1-2-3 EZ Marketing™