

TaxCoach Software
Advanced Programs



	Basic TaxCoach	Wire Service	All- Stars	Press Club	Certified Tax Coach
Who should apply?	Proactive tax planning that <u>builds</u> your <u>business</u>	Looking for interesting regular contact that your clients will <u>read</u> ?	Looking for one-on-one <u>coaching</u> , and <u>masterminding</u> with TaxCoach peers?	Looking for "Done For You" systems to <u>find</u> clients and <u>keep</u> clients?	Looking for <u>advanced</u> tax strategies, CPE, peer forums, and marketing insight, <u>all in 1</u> ?
Weekly <i>Briefs</i> e-newsletter	✓	✓	✓	✓	✓
TaxCoach <i>Planning Software</i>	✓		✓	✓	✓
TaxCoach <i>Business Development Suite</i>	✓		✓	✓	✓
License to use, adapt & publish TaxCoach strategy and marketing content	✓		✓	✓	✓
TaxCoach <i>University</i> training webinars	✓	✓	✓	✓	✓
Monthly <i>Lineup</i> mailed letter	✓		✓	✓	✓
Group Q&A Call-Ins	✓		✓	✓	✓
<u>Elite</u> membership status:			✓	✓	
<u>Monthly personal coaching calls</u> with Ed Lyon			✓	✓	
Direct coaching appointment <u>self-scheduling</u>			✓	✓	
<u>Monthly masterminding webinar</u>			✓	✓	
<u>Priority access</u> for news, events, gifts, new materials			✓	✓	
Access to <u>Elite members' listing</u> and <u>contact data</u>			✓	✓	
<u>Discounted registration</u> for TaxCoach national events			half price	free	
<u>Comprehensive marketing analysis</u>				✓	
<u>Online Marketing</u> system, including web copy overhaul				✓	
Website <u>opt-in box</u>		✓		✓	
<u>Referral Generation</u> system				✓	
"Done For You" <u>weekly client/prospect emails</u>		✓		✓	
Email list management		✓		✓	
<u>Territory exclusivity</u>				by zip code	
<u>3-day training academy</u> for certification					✓
On-line training courses					✓
CTC <u>monthly dues included</u> in PC fee (once certified) *				includes CTC	✓
License to use <u>unique "CTC" designation</u>					✓
<u>Advanced</u> tax strategy and marketing resources					✓
<u>National discussion forum</u>					✓
Listing on nationally searchable <u>prospecting website</u>					✓
<u>Ongoing CPE</u> webinars					✓
Regular <u>case study call-ins</u>					✓
Monthly fee	79/mo	197/mo	299/mo	697/mo	197/mo
Startup	30-day trial	up to 14 days		up to 14 days	2,500
Cancellation		30-day notice		30-day notice	30-day notice
More Information?	www.TaxCoachSoftware.com www.TaxCoachWireService.com www.TaxCoachAllStars.com www.TaxCoachPressClub.com www.CertifiedTaxCoach.org				
Subscribe online	✓	✓			
By application only - fax in preliminary enrollment form			✓	✓	✓