



# SALES TOOLS INSPIRATION

The Distinctive Brands  
& Marketing Materials of  
PASBA Firms & Individuals



Work Smarter, Make More Money, Take More Quality Time Off!

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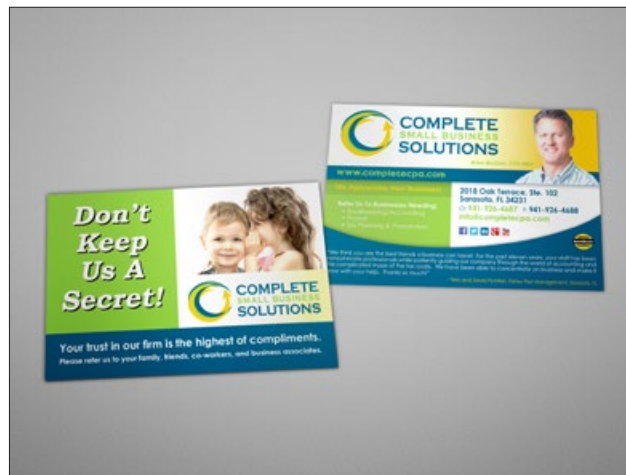


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# Sales Tools Inspiration: Complete Small Business Solutions



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## Sales Tools Inspiration: Complete Small Business Solutions



**COMPLETE**  
SMALL BUSINESS  
SOLUTIONS

### Discovery Agenda

- Tax & Accounting Needs & Concerns
- Your Company Profile
- Professional Introduction
- Data Collection
- Clarify Expectations
- Specific Next Steps



**Brian McGinn, CPA MBA**  
2018 Oak Terrace, Ste. 102  
Sarasota, FL 34231  
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[www.completetcpa.com](http://www.completetcpa.com)

"Complete Small Business Solutions has been providing accounting and tax planning services for our personal and business needs for over 10 years. Brian McGinn and staff have been invaluable in assisting with monthly accounting and yearly tax preparation needs for our business concerns. We highly recommend them."

- Michael and Susan de Bondt  
Dynamic Range Enterprises, Inc.  
Sarasota, FL

**Focused On Your Company's Financial Success!**



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### Conclusion Agenda

- Review of Last Meeting
- Proposal
- Decision
- Schedule Strategy Session
- Referrals



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"CSBS has been a great partner for over 15 years. Their advice and proactive approach have helped us expand our businesses. We have peace of mind knowing that everything is under control. Do yourself a favor--sign up now!"

- Linda & Greg Breslich, Owners  
North Trail Liquors/Memories Lounge  
and Dock 633 Restaurant  
Sarasota and Lake Placid FL

**Focused On Your Company's Financial Success!**

### DISCOVERY & CONCLUSION AGENDAS

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## Is Your Business Healthy?

**Ask Yourself These Diagnostic Questions To Determine If You Need a Business Checkup:**

**Have You Had Tax Surprises?** Don't let your business be stressed out by a high and unexpected tax liability! Unexpected interest and/or penalties due to poor tax planning result in a cash flow drain that disrupts your business.

**Have You Had To File Extensions?** Businesses need their tax returns filed on time. This insures better and quicker year-end numbers AND better budgeting. Filing promptly lessens the likelihood of penalties and interest!

**Have You Received Tax Notices?** If you have received IRS or state tax notices about inaccuracies or late payments, you know that responding to these notices is very time consuming!

**Are You Interested In Increasing Your Tax Savings and Business Profits?** Proper tax planning increases cash flow to grow your business. Ensure that you are getting every tax break available to your business. We show you how to keep more of your money!

**Are You Managing Your Business By The Numbers?** Numbers don't lie! Accurate, up-to-date financials are objective and give you the clarity you need to manage your business properly. We always have our finger on the financial pulse of your business and are eager to discuss how to move your business forward!

**Do You Have Work/Life Balance?** Many business owners work too much and have little free time. We take care of your financials so you can passionately pursue your business goals and take some vacation. We save you time, money, and give you peace of mind!

**At Complete Small Business Solutions, we monitor the health of your business all year long. Make an appointment with Brian today for a face-to-face consultation. He will give your business a thorough checkup to see how he can help your business reach its true potential.**







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Bookkeeping

## Worry-Free Accounting

Turn Over Time-Consuming Bookkeeping Tasks To Us:	The CSBS Bookkeeping Advantage:
<ul style="list-style-type: none"> <li>Bank Reconciliations</li> <li>Recording Deposits</li> <li>Tax Preparation</li> <li>Financial Reports</li> <li>Payroll/Tax Deposits</li> <li>Year-End 1099s, W2s</li> </ul>	<ul style="list-style-type: none"> <li>Focus On Your Business Instead of Bookkeeping</li> <li>Cost Savings By Eliminating On-site Clerical Staff</li> <li>Simple &amp; Secure Online Process</li> <li>Convenient &amp; Fixed Fee Pricing</li> </ul>

## Bookkeeping Made Simple

- 1. Securely Scan Documents To Our Office**
- 2. Our Bookkeeping Professionals Process Documents**
- 3. All Financial Documents Delivered To You Online**

**We Are Accurate, Convenient, and Paperless!**

**You Have Access To Your Financials Anytime, Anywhere!**

**Brian McGinn, MBA CPA** - *your trusted business advisor providing you with the services and support to successfully operate your business. You focus on growing your business, we will take care of the books!*

"CSBS is a tremendous resource and an outstanding value. Their information helps me stay in control of my business, personal accounting, and taxes. Call Brian McGinn and Complete Small Business Solutions to help you solve your accounting challenges!"

- Bill Crowley - Owner, Crowley Sales, LLC  
St. Cloud, FL





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The CSBS Advantage	Traditional Accounting Firm
<b>State of the Union Address at Initial Meeting -</b> All records and tax strategies are reviewed. We verify whether accounting procedures have been set up properly and look for all available tax saving deductions.	Clients Start With QuickBooks and Records are Updated at Year End
<b>Proactive, Regularly Scheduled Meetings and Strategy Sessions</b>	Call If You Have Questions
<b>Our Concentration is Specializing in Small Business Owners</b>	Varied Revenue Sources Result in a Diverse, Inefficient Focus
<b>Records Updated Monthly -</b> Your Company's Financial Snapshot is Always Current.	Records Typically Sent to Accountant in February or March
<b>Client Knows Their Tax Liability 4-6 Months Before Due Date -</b> It's too late in March or April to search for tax savings! We proactively and efficiently search for your tax savings ALL YEAR LONG.	Client Learns Their Tax Liability Sometime Between April and October
<b>One-Stop Shop -</b> We manage your bookkeeping, taxes, payroll, tax planning and business planning. Our entire team keeps every facet of your business running smoothly, all under one watchful eye.	Clients Have Bookkeeping, Payroll, and Tax Planning Done Through a Variety of Sources
<b>Our Experienced Staff Knows You and Cares About You and Your Business -</b> We want to be your trusted business and financial partner for life.	Clients are Customers
<b>Fixed Pricing, Quoted Up Front, All Inclusive</b>	Clients Discover Accounting Fees When Billed

"We have been using Complete Small Business Solutions for 13 years and find their accounting and reporting services to be timely and useful. This up-to-date information helps us run the business, keeps us informed, and be more profitable. I personally recommend the services of Brian McGinn and his team without reservation."  
 ~ Joseph V. Ambrose - Owner, Pet Doors, USA, Inc., Bradenton, FL

**We've Got The COMPETITIVE ADVANTAGE!**

State-of-the-Art Technology Allows Us to Outperform Our Competitors



**We Employ Layers of Technological Resources to Propel Our Clients To Efficiency & Success**

**VIP Immediate EMERGENCY Access to Your CSBS Advisor**  
 Contact us via a specialized procedure we provide only to VIPs!

**Online Meetings**  
 Our firm places a HIGH VALUE on your time. With any PC or mobile device, you can see, hear, and conference with us in real time.

**Cloud-Based Portal Communication Tool**  
 Our cloud platform permits 24/7/365 immediate & auto-encrypted access to all documents, files and communication with email notification. Your software and data are always available and retrievable from any location.

**Email is a Secondary Communication Tool**  
 How many unwanted emails do you plow through daily? Our technology notifies you directly and immediately, and uses an importance scale to alert you to what needs to be read now or reacted to later.

**Video & Screencast Communication Platforms**  
 We send you videos so you can SEE AND HEAR US on your PC, cell phone, or other mobile device. No more misinterpreting (voice mail messages, lengthy email explanations, snail mail communication) what we ask or share with you in regards to your documents! This saves time and increases efficiency.

**Cloud-Based Bookkeeping Software**  
 All your financial documents can be transferred securely to our office. Our clients get complimentary access to their accounting and bookkeeping data on our cloud computers. We provide software downloads and updates, and software training is available.

**Advantages To Our Clients**

- Top-Notch Efficiency
- Up-To-The Minute Accuracy
- Increased Productivity
- Highest Levels of Security
- High-Speed Processing
- Increased Communication

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 ~ Bill Crowley - Owner, Crowley Sales, LLC St. Cloud, FL





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Outsourced Accounting - Bookkeeping - Payroll  
Tax Planning - Tax Preparation  
Extraordinary Client Service Professionally Delivered



### Discovery Agenda

- Tax and Accounting Needs & Concerns
- Your Company Profile
- Professional Introduction
- Data Collection
- Clarify Expectations
- Specific Next Steps



**Damon Yudichak, MBA CPA**  
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"We started our residential real estate business in 2009 and brought Damon on as our principal adviser for all matters relating to taxes and accounting. **We have doubled our business each year** and **Damon has been a critical partner** and collaborator on all of our tax accounting, bookkeeping and planning processes that have allowed us to successfully focus on our business. Because of his services we have been able to leverage our success and look to continued growth."



Outsourced Accounting - Bookkeeping - Payroll  
Tax Planning - Tax Preparation  
Extraordinary Client Service Professionally Delivered



### Conclusion Agenda

- Review of Last Meeting
- Recommendations
- Proposal
- Conclusion
- Referrals



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"Having a CPA working on the financials is extremely reassuring to a nonprofit executive who doesn't have that skill set. Damon has contracted with us for over four years and **I highly recommend him** to anybody – business or nonprofit. Outsourcing the accounting piece to our organization has freed up the staff and myself to pursue other opportunities. He takes exceptionally good care of us – it's displayed in his responsiveness and his sincere interest in our business and financial future."

### DISCOVERY & CONCLUSION AGENDAS

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# Sales Tools Inspiration: Yudichak CPA PC



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damon@yudichakcpa.com

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**Why Damon Yudichak?**

- Professional & Proactive
- Small Business Expertise
- Unmatched Personalized Service
- Highest Standards of Ethics & Integrity

**About Damon**

Before starting his accounting firm in 2008, Damon worked as a corporate accountant, tax accountant, and a financial statement auditor. Damon's goal at Yudichak CPA PC is to provide small business and individual clients with superior financial solutions and sound tax strategies. As a passionate small business owner himself, Damon knows firsthand the joys and challenges of small business ownership.



After serving in the US Army for three years, Damon received both his B.S. in Accounting and his Masters of Business Administration from North Carolina State University. In 2010, the Triangle Business Journal recognized Damon as being one of their 40 Under 40 leadership recipients.

In his free time, Damon enjoys spending time with his wife, two daughters and son. He enjoys running and training for marathons.

**Increase Profitability**  
With Our Small Business Package:

- Flexible, Customized Solutions
- Fixed-Fee Pricing
- Tax Savings Strategies
- 24/7 Portal Access
- Proactive Business Advisory Team

**Our Mission Statement**  
*To help small business owners grow their business, reduce taxes, be more profitable and increase their net worth.*



Experience  
Worry-Free  
Accounting  
Call Damon  
919-926-1342




**Testimonials**

"Damon is a straightforward person. He is very honest and also very thorough in his approach to his business. He is a reliable partner for any business that needs accounting consultation."  
- Mike Olson, Owner, Dynasty Communications, Wake Forest, NC

"The project that was undertaken by Damon's team involved an analysis and strategic growth recommendations for Arbor Pharmaceuticals. I would highly recommend Damon to any growth-oriented organization in need of critical thinking in order to better assess company performance, uncover growth opportunities and challenge conventional wisdom."  
- Jamett Diltrow, President & CEO, Arbor Pharmaceuticals, Inc., Raleigh NC

**Outsourced Accounting - Bookkeeping - Payroll - Tax Planning - Tax Preparation**  
**Extraordinary Client Service Professionally Delivered**

## FAST FACTS PROFILE



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**Outsourced Accounting - Bookkeeping**  
**Payroll - Tax Planning - Tax Preparation**  
**Extraordinary Client Service Professionally Delivered**

At Yudichak CPA PC, our mission is to help small business owners grow their business, reduce their taxes, be more profitable and increase net worth. The depth of our experience, our commitment to personal service, and our high standards of professionalism have earned us hundreds of satisfied clients.

**Client Reviews**



"As a small business owner, it is often difficult to step back and see how my business is doing at any given time. Entrusting Damon with the accounting gives me the time to concentrate on growing my business, knowing that he will stay up-to-date on the relevant tax information and is looking out for the best interest of my company."  
- Chris Morris, Owner  
Rock It Learning Science Camp - Raleigh, NC



"Bringing Damon on for accounting and tax purposes... just a reasonable monthly fee! Keeping our business legal and my business partner sane... PRICELESS!"  
- Tonya Baskerville, Owner  
Art on the Fringe, LLC, Raleigh, NC



"We started our residential real estate business in 2009 and brought Damon on as our principal adviser for all matters relating to taxes and accounting. We have doubled our business each year and Damon has been a critical partner and collaborator on all of our tax accounting, bookkeeping and planning processes. Because of his services we have been able to leverage our success and look to continued growth."  
- Rachel Kendall, Owner  
The Rachel Kendall Team, LLC, Raleigh, NC



"Damon Yudichak is a diligent and consistent professional and an outstanding CPA. I've worked with Damon since 2009 and I've felt like a valued customer since the beginning of our relationship. He and his firm are a vital link to my business."  
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## TESTIMONIAL SHEET

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## Are you Ready for a Fresh Approach to your Accounting Needs?



**State of the Union Address**

- Owner Compensation Analysis
- Deduction Finder
- Financial Statement Review
- Record Keeping Analysis
- Tax Strategies/Projection
- Entity Analysis



**Proactive Monitoring**

- Record Keeping Support
- Monthly Review
- Timely Guidance & Consultation
- Up To Date Business Picture
- Foundation for Effective Tax Planning
- Year-Round IRS Compliance



**Tax Planning**

- We Proactively Call You
- Avoid Costly Mistakes/Surprises
- Structured, In-Person Meetings
- Year-Round Involvement & Advice
- Comprehensive Tax Planning Checklist



**Tax Preparation**

- Timely Tax Preparation
- Business Returns Completed in January
- Individual Returns Completed in February
- Plan & Review Results in March

**Proactive Business Solutions**  
Experience A Fresh, Holistic Approach

Instead of servicing isolated segments of your business once or twice a year, our client care team proactively monitors the complete picture of your business all year round. We keep your financials streamlined and current, while reducing your liabilities and increasing your tax returns – this results in more horsepower for your business and more profits for your bottom line!

We've won a loyal following with our Proactive Business Solutions package which works for all businesses! Call us today and discover how PBS can propel your business!



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**Give Us A Call Today**  
Discover Why Our Clients Work With Us,  
Stay With Us and Refer Us!

"Damon has a passion for working with small business owners by providing education and support to their special needs. He has a huge gentle spirit that affords him the inherent nature of being a good listener. Damon provides service based on your needs without assumption or judgment."  
Mary Yount, Executive Director,  
Knightsdale Chamber of Commerce, Knightsdale, NC

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## BREAKING UP is Hard to Do!

But are all the accounting needs of your business being fulfilled?

**You Have Nothing To Lose By Keeping Your Options Open**

We stay in relationships out of habit, even though it may not be the best decision for us. **Perhaps it's time to review the quality and effectiveness of your current relationship** and decide if an accounting change is warranted.



- They think all accountants are the same
- Change is too much of a hassle
- It's too awkward to break off with your current accountant

Reluctance to change is understandable, but recognizing the benefits of change is **essential to your business' success**. Experience the Yudichak CPA PC difference! We are not just number crunchers and tax filers who service your account – we are proactive and business savvy. We are constantly looking for ways to increase your wealth and advance your business success!

**for a totally free business checkup.**  
Your business can reap huge benefits by changing to a more future-focused, business-oriented accountancy firm – a firm that will help you reach your business goals more quickly – a firm that will help you reduce liabilities and increase tax returns. A quick consultation with us will reveal to you whether you are getting all the services you've been paying for.

We understand the difficulties associated with change and will help you work through them if you decide to convert to our services. We will write a letter to your current accountant explaining that you are leaving, then call them to have your files sent over to us. No awkward explanations or phone calls for you –

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COMPETITIVE ADVANTAGES

# Sales Tools Inspiration: PlusMinus Accounting

  
**BOOKKEEPING SERVICES**





Do you wonder if you're classifying expenses correctly?

Tired of your tax bill being a surprise each year?

At the end of the year, do you say "there is no way I could have made that much money"?

Not sure if you are accounting for all of your expenses?

Need help with your accounting questions?

Have trouble keeping up with current law changes?

Spending too much of your time on your accounting?

### Navigating your big and small accounting needs.

**BOOKKEEPING SERVICES:**

- Monthly financial statements
- Training in how to read and understand your financials
- Quarterly tax planning
- Discuss current tax law changes and how they may effect you and your business
- Business entity review
- Record keeping system review
- 24/7 online secure access to your documents

**WHAT WE NEED FROM YOU:**

- Bank statements
- Check register and/or check images
- Credit card statements
- Loan statements
- Cash receipts

**PRICING:**

Starts at \$150 per month

**Give us a call today!**

**MAKE AN APPOINTMENT**  
Angela Greene | 503-594-2895 x105  
algreene@plusminusaccounting.com

615 8TH STREET, OREGON CITY, OR 97045 | 503-594-2895 | PLUSMINUSACCOUNTING.COM

  
**PAYROLL SERVICES**



### Local Flexible Your Neighborhood Solution Personalized Customer Care

  
Spending too much time on payroll?  
Are you familiar with tax law?  
Need a local, reliable accounting firm?

### Ride with us through payroll challenges.

**PAYROLL CHALLENGES:**

When a business has payroll challenges, it doesn't necessarily mean they're in disarray. However, if persistent payroll challenges aren't solved, they will send a business into a troubling, never-ending spiral. Keep your payroll from jumping track.

**PAYROLL SERVICES:**

- Flexible, full tilt payroll processing lets you focus on business as usual
- CPA oversight means first rate payroll processing
- Personalized customer service you deserve from a local, small business neighbor
- We know you by name, not some randomly assigned customer number
- Tax payments, reporting, and filing included in reasonable, competitive fees

**PRICING:**

Payroll Processing Fee starting at \$40 per payroll, \$2/check per Employee

**Give us a call today!**

**MAKE AN APPOINTMENT**  
Syna Pham | 503-594-2895 x104  
spham@plusminusaccounting.com

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## SALES SHEETS

Work Smarter, Make More Money, Take More Quality Time Off!

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[referral.chuckbauer.com](http://referral.chuckbauer.com)



# Sales Tools Inspiration: PlusMinus Accounting



PRICE SHEET



Navigating the world of finance, tax law, and accounting can be overwhelming. At Plus Minus we understand these challenges, and look to being a navigational tool for our clients. Think of us as a GPS for your finances and your business.

We combine accuracy, forethought, technology and strong communications to create precise results for our clients. For us, it's not about "coming close," or "almost making it." It's about making sure you reach your stated goal.

**ACCOUNTING & BOOKKEEPING FEES:**  
Starting at \$150 monthly



**PAYROLL FEES:**  
Payroll Processing Fee starting at \$40 per payroll, \$2/check per Employee



**PERSONAL & BUSINESS TAX RETURN FEES:**



1040	\$ 350
1040 w/ Schedule C	\$ 750
1120/1065	\$ 1,360




Want to learn more?

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algreene@plusminusaccounting.com

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CAREER OPPORTUNITIES



Why Plus Minus?

Plus Minus is a reputable company with over 20 years of experience. We advance small businesses through a full range of tax and accounting services that meet their needs. Success has been proven with a steady 25% increase in revenue growth each year.


We're looking to add a qualified **Bookkeeper** to join our team. If you want to contribute to a successful, growing company, contact our job line and leave a voice message.

503-782-0543

Absolutely no emails or faxes. Qualified candidates will be contacted after resume reviews.


**PLUS MINUS OFFERS:**

- Competitive salary, commission package and benefits package
- Creative, progressive work environment
- Reputable company with over 20 years of experience
- Generous vacation/sick policy
- Ongoing training
- Sales management opportunities



**SEARCHING FOR AN EMPLOYEE WHO:**

- Follow company procedures and systems
- Portray a neat professional image
- Are willing to learn new tasks
- Have excellent communication skills



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## SALES SHEETS

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# Sales Tools Inspiration: PlusMinus Accounting



COMPANY  
OVERVIEW



Is your bookkeeper an accountant? Do they know how to keep you out of trouble with the IRS?

Do you get charged a lot at the end of the year to fix your Quickbooks?

Do you wonder if you're classifying expenses correctly?

Spending too much time on payroll?

Are you familiar with tax law?

Need help with your accounting questions?

## Set your course with Plus Minus Accounting.

**DRIVEN BY PRECISION:**

Navigating the world of finance, tax law, and accounting can be overwhelming. At Plus Minus we understand these challenges, and look to being a navigational tool for our clients. Think of us as a GPS for your finances and your business.

We combine accuracy, forethought, technology and strong communications to create precise results for our clients. For us, it's not about "coming close," or "almost making it." It's about making sure you reach your stated goal.

Our professional services run the gambit, each delivered with accuracy and effectiveness. Our goal is to make sure you're in position to arrive where, when, and how you want.

**SERVICES PROVIDED:**

- Tax & Accounting Services
- Bookkeeping Services
- Payroll Services
- Business Advice & Consultation

**You need us!**

**MAKE AN APPOINTMENT**  
Angela Greene | 503-594-2895 x105  
algreene@plusminusaccounting.com

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CAREER  
PACKAGE



## Hello, and welcome to Plus Minus Accounting.

**FIRM HISTORY**

Stephan P. Sykes founded his accounting firm in September 1995. By then he'd spent a decade in the field, and while he was grateful for the professional experience and mentoring he received, he was ready to launch out and offer his own brand of services throughout the Greater Portland area.

In 2007, Sykes decided to relocate the business a few miles southeast to Oregon City. While still working with many clients in and around downtown Portland, as well as the western suburbs, the move provided an opportunity to expand his client base as well as his services.

Upon celebrating 25 years in the business, Steve engaged with a Portland creative team to re-brand. In March of 2011, the firm unveiled its new identity, Plus Minus, Inc.

**WHY PLUS MINUS?**

Plus Minus is a reputable company with over 20 years of experience. We advance small businesses through a full range of tax and accounting services that meet their needs. Success has been proven with a steady 25% increase in revenue growth each year.

We combine accuracy, forethought, technology and strong communications to create precise results for our clients. For us, it's not about "coming close," or "almost making it." It's about making sure you reach our clients' goal.

## Congratulations!

You have passed our first requirement by having a qualified resumé.

We are looking for a **Bookkeeper** that thrives on a culture of success and ambition. Duties include data entry, preparing monthly financial reports, reconciling bank accounts, and customer communications for 40+ customers.

Please read through the document and complete the PDF questionnaire within 24 hours. We look forward to hearing from you!

**Good luck!**

**QUESTIONS? CONTACT:**  
Angela Greene  
algreene@plusminusaccounting.com

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## SALES SHEETS

# Sales Tools Inspiration: PlusMinus Accounting

PlusMinus

CAREER PACKAGE



Plus Minus Offers:

- Competitive salary, commission package and benefits package
- Creative, progressive work environment
- Reputable company with over 20 years of experience
- Generous vacation/sick policy
- Ongoing training
- Sales management opportunities

Benefits:

- Education Assistance
- Paid Holidays/Vacations
- Retirement Plan
- Service Awards
- Social Security
- Unemployment
- Compensation Insurance
- Workers' Compensation Insurance

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## Plus Minus Career Package Questionnaire.

**INSTRUCTIONS**

- Fill out the form by selecting the fields with the mouse, or using the tab to navigate between fields.
- Use the File menu to save the form once you have finished.
- Email your completed questionnaire to Angela Green at [algreene@plusminusaccounting.com](mailto:algreene@plusminusaccounting.com).

---

**QUESTIONS**

Have you ever been convicted of or plead guilty or no contest to a felony or misdemeanor?

Felony ☐ Y ☐ N

Misdemeanor ☐ Y ☐ N

Are you currently under investigation by any legal regulatory authority? ☐ Y ☐ N

Have you or a firm in which you were a partner had liens or judgments against you? ☐ Y ☐ N

What do you expect to make in the next two years?

2015 \$

2016 \$

If accepted, do you agree this position would be your only career path? ☐ Y ☐ N

Do you possess time management skills? ☐ Y ☐ N

Are you tenacious in your attention to detail? ☐ Y ☐ N

Are you a self-starter? ☐ Y ☐ N

Do you have established, written goals? ☐ Y ☐ N

How many sick days have you taken in the last 12 months?

Years of customer service?

How soon can you start training?

PlusMinus

CAREER PACKAGE



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## Questionnaire continued.

**WILL YOU SUBMIT TO:**

A personality profile assessment? ☐ Y ☐ N

A background check? ☐ Y ☐ N

Drug testing? ☐ Y ☐ N

**TELL US MORE**

Describe your background. Include length of time, travel requirements, type of compensation, and client base.

Describe why you left your last two positions.

Submit Form

## CAREER PACKAGE QUESTIONNAIRE

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# Sales Tools Inspiration: Robert Liberto CPA PC



REFERRAL RESPONSE CARD



MAIN POINT CARD





**Robert A. Liberto, CPA, P.C.**  
*Certified Public Accountant*

**COMMITTED TO EXCELLENCE.**

Robert A. Liberto, CPA began practicing public accounting preparing tax returns for friends, family and co-workers. Bob acquired a small tax and accounting practice which helped to propel him to the next level of growth he desired. Since 2000, the firm, owned by Bob and his partner, continues to thrive, serving small business clients in the service, retail, wholesale, and small contracting industries.

**Why Work With RALCPA?**

- Superior Technology
- Incentive-based Compensation Programs
- Variety of Business Clients
- Attractive, Progressive Work Environment

**Our Company Offers**

- Part-Time and Full-Time Positions
- Paid Vacation and Holidays  
*Even for Part-Time Employees*
- Retirement Plan
- Ongoing Training
- Other Paid Benefits

**ACCOUNTING POSITION NOW AVAILABLE WITH AN ESTABLISHED TAX AND ACCOUNTING FIRM!**

RALCPA is a successful tax and accounting firm that is poised to grow. We are based in White Marsh, Baltimore County, Maryland and provide stellar service to serve small businesses and their owners. The firm's approach to servicing these small businesses is unique and distinctive because of our proven process and our client contact model.

**QUALIFICATIONS FOR SUCCESSFUL CANDIDATES**

- 2-to-3 Years Experience in Public Accounting, Preparing Financial Statements, and Business Tax Returns
- Experience with Managing People and Client Interaction
- Desire to Work as a Team Member to Build a Firm
- Well-Versed in Accounting and Tax Regulations.
- Driven with a Proven Ability to Produce Results
- Technologically Savvy


**IF YOU HAVE THE SKILLS AND ENTHUSIASM TO BE SUCCESSFUL, SEND YOUR RESUMÉ TO:**

**ROBERT A. LIBERTO**  
careers@ralibertocpa.com

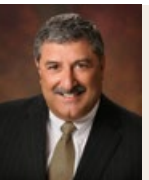
LEARN MORE ABOUT US ON OUR WEBSITE  
[WWW.RALIBERTOCPA.COM](http://WWW.RALIBERTOCPA.COM)

**Absolutely NO Phone Calls!**  
Qualified candidates will be contacted after resumé reviews.

# Sales Tools Inspiration: Robert Liberto CPA PC



**Robert A. Liberto, CPA, P.C.**  
Certified Public Accountant



5430 Campbell Blvd, Ste 113  
White Marsh, Maryland 21162  
**410-931-5010**  
Toll Free: 866-488-3880  
Fax: 410-931-5013  
raliberto@ralibertocpa.com

**WWW.RALIBERTOCPA.COM**

**WHY ROBERT A. LIBERTO, CPA, P.C.?**  
Robert A. Liberto, CPA, P.C. specializes in meeting the accounting, tax, and consulting needs of the small business and its owner, including **service, retail, wholesale, and small contractor industries**. They also offer electronic transfer between the client and their firm and secure private portals for client documents.

- Resources, Experience, Depth of Knowledge
- Commitment to Integrity and Confidentiality
- Delivery of Superior Service
- Strategies to Enhance Your Possibilities

**PRODUCTS AND SERVICES**

- Bookkeeping and Financial Statements
- Tax Preparation and Planning
- Business Consulting and Outsource Services

*Don't compromise on financial service. Contact Robert A. Liberto today.*  
**Call 410-931-5010**

*Our mission is to provide our clients with accurate financial information and help them grow their businesses.*

**WHY ROBERT A. LIBERTO?**

- Professional and Pro-Active Staff
- Diversity of Service
- Accessibility and Commitment

**ABOUT ROBERT A. LIBERTO**

Robert A. Liberto established the original practice in 1986, specializing in small businesses with sales of 1-5 million. Robert is always looking for a way to improve service to clients. His **professionalism, thoroughness, and expertise** makes him the right choice for all your business and personal accounting needs.

Robert was born and raised in Carney/Parkville, Maryland. He attended Calvert Hall College and the University of Baltimore. He and his wife and daughter live in Perry Hall, Maryland. His interests include boating, fishing, pro football, and NASCAR.

**TESTIMONIALS**

"I heartily recommend Bob Liberto. My companies have used the services of Bob Liberto for more than a decade. His advice and guidance has **saved us thousands of dollars** and countless hours of time. His company has the people and experience for any financial or accounting assignment."

*-Calvin Clemons, Association Management  
White Marsh, Maryland*

"After more than 30 years as my CPA, Bob is my go-to advisor on most business issues. Whether it's a business issue or personal tax analysis, I don't make an important decision without speaking to Bob first. I give his organization my highest personal and professional recommendation. I am grateful to have him as part of my business team!"

*-Alfred Redmer, Jr., Insurance & Investments  
Baltimore, Maryland*

## FAST FACTS PROFILE



**Robert A. Liberto, CPA, P.C.**  
Certified Public Accountant  
**410.931.5010**  
5430 Campbell Blvd., Suite 113  
White Marsh, MD 21162  
**www.ralibertocpa.com**




**Accounting • Tax Planning • Business Consulting**

Our Firm Offers	Your Business Benefit
Fixed Monthly Fee	No fee surprises
Tax Savings	Find opportunities to lower your taxes throughout the year
Unlimited Consultations	Call or email – questions are welcome so you stay informed
Business Monitoring	Monthly, timely business advice to help your business grow
Game Planning Strategy Sessions	Discuss vision, tax planning, and prior tax returns
Small Business Experts	Our specialty lies in businesses with annual sales up to ten million dollars
Quality Professionals	Close personal and professional attention – embrace high standards, and undergo peer review
Trustworthy	Your CPA is your most trusted business advisor, and client confidentiality is a top priority
Dedicated Staff	Proactive personnel dedicated to growing your business
Partnership	Work as your “partner” in business, acting as a sounding board and advisor
Monthly Tax Newsletter	Keeps you informed of tax law changes
Electronic Storage of Your Documents	Secure storage of documents with 24/7 access

*“For many years Robert Liberto, CPA, has provided superior accounting services and timely business advice. He is always accessible and extremely helpful. I highly recommend his firm!”*

**John Kelmenson, DDS**  
Baltimore, Maryland

## COMPETITIVE ADVANTAGES

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## Sales Tools Inspiration: Jeff Mathews CPA



**Jeff Mathews**  
CERTIFIED PUBLIC ACCOUNTANT  
BUSINESS AND ADVISORY SERVICES

# DISCOVERY AGENDA

- Professional Introductions
- Clarify Expectations & Process
- Business Goals & Concerns
- Tax, Accounting, Payroll Needs
- Specify Next Action Steps

*"Jeff is not just my CPA,  
but my partner in business!"*  
David Eakin - Troop Media, LLC

**Jeff Mathews, CPA**  
Senior Business Advisor

3813 Maplewood Dr. • Sulphur, LA 70663  
Ph: 337.528.2272 Fax: 337.625.5272  
Email: jeff@swlacpa.com  
www.swlacpa.com



**Jeff Mathews**  
CERTIFIED PUBLIC ACCOUNTANT  
BUSINESS AND ADVISORY SERVICES

# CONCLUSION AGENDA

- Summarize Challenges
- Proposal of Solutions
- Make Business Decisions
- Start & Schedule Services
- Our Referral Process

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but my partner in business!"*  
David Eakin - Troop Media, LLC

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DISCOVERY & CONCLUSION AGENDAS



## Sales Tools Inspiration: Jeff Mathews CPA



**Jeff Mathews**  
CERTIFIED PUBLIC ACCOUNTANT  
BUSINESS AND ADVISORY SERVICES

**ABOUT OUR FIRM**  
Welcome, I'm **Jeff Mathews, CPA**. I would like to share with you our firm information, and why we do what we do. I attended McNeese State University and recieved my Bachelor's Degree in Accounting and my Master's in Business Administration. I began working in public accounting in 1997 — the last two years of my initial accounting degree. I have also worked for a large publicly traded company in corporate / managerial accounting. I began my own practice in April of 2002. I had only one client, but knew what I wanted. I wanted to help business owners build the business of their dreams.

**OUR SERVICES**

**Small Business Payroll Package**

- Live Payroll Preparation & Reporting
- Direct Deposit Services Included
- Time Tracking & Time Clock Options
- Impounding Not Required (Keep Your Money Longer)

**Small Business Compliance Package**

- Full Charge Bookkeeping Including Sales Tax
- Business Tax Planning & Preparation
- Compiled Financial Statements & More!

**Advisory Growth Services**

- Small Business Diagnostic Report
- Small Business Goal Setting
- 6 Month Implementation & Coaching Plan

**Other Services:**

- Quickbooks Consulting Services
- Business Mergers & Acquisitions
- Outsourced Backoffice Services

**"Jeff is not just my CPA, but my partner in business!"**  
*David Eakin - Troop Media, LLC*

**OUR SERVICES ARE FOCUSED ON YOUR BUSINESS SUCCESS!**

**Jeff Mathews, CPA**  
Senior Business Advisor  
3813 Maplewood Dr. • Sulphur, LA 70663  
Ph: 337.528.2272 Fax: 337.625.5272  
Email: jeff@swiacpa.com

Reach us online!

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[www.swiacpa.com](http://www.swiacpa.com)

FAST FACTS PROFILE



**BREAKING UP IS HARD TO DO!**

*But are all the **accounting needs** of your business being fulfilled?*

**TAKE ONE STEP!**

Call Us for a totally free business checkup. Your business can reap huge benefits by changing to a more future-focused, business-oriented accountancy firm – a firm that will help you reach your business goals more quickly – a firm that will help you reduce liabilities and increase tax returns.

A quick consultation with us will reveal to you whether you are getting all the services you've been paying for. We understand the difficulties associated with change and will help you work through them if you decide to convert to our services. We will write a letter to your current accountant explaining that you are leaving, then call them to have your files sent over to us. No awkward explanations or phone calls for you – just a better direction for your business' future!

**YOU HAVE NOTHING TO LOSE BY KEEPING YOUR OPTIONS OPEN**

We stay in relationships out of habit, even though it may not be the best decision for us. **Perhaps it's time to review the quality and effectiveness of your current relationship and decide if an accounting change is warranted.**

**BUSINESS OWNERS RESIST CHANGE BECAUSE:**

- They think all accountants are the same
- Change is too much of a hassle
- It's too awkward to break off with your current accountant

**Jeff Mathews, CPA**  
Senior Business Advisor  
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Sulphur, LA 70663  
Ph: 337.528.2272  
Fax: 337.625.5272  
Email: jeff@swiacpa.com

Reluctance to change is understandable, but recognizing the benefits of change is **essential to your business' success**. Experience the Jeffrey Mathews, CPA difference!

We are not just number crunchers and tax filers who service your account – we are proactive and business savvy. We are constantly looking for ways to **increase your wealth and advance your business success!**

[f](#) [in](#) [v](#) [t](#)

[www.swiacpa.com](http://www.swiacpa.com)

SALES SHEET

# Sales Tools Inspiration: Appletree Business Services



Small business confidence - Simple and accountable  
[www.AppletreeBusiness.com](http://www.AppletreeBusiness.com)

**Steven Feinberg, Owner**  
 @CPAsteve  
 603-434-APPLE (2775)  
 15 Londonderry Rd, Unit #7  
 P.O. Box 1220  
 Londonderry, NH 03053



**Why Appletree?**

- 25+ Years' Experience With Small Business Owners
- Integrity & Commitment
- Better Questions/Better Solutions
- PASBA 2010 Accounting Firm of the Year
- Business Financial Confidence Map™

**Why Steven?**

- Specializing in Creating Business Financial Confidence
- Contributing Author, "Six Steps to Small Business Success"
- Member, Tax Software Task Force of New Hampshire Society of CPAs
- Past Board Member, Professional Association of Small Business Accountants (PASBA)

**About Steven**

After graduating from Bryant University with degrees in Accounting and Systems Management, Steve worked for Price Waterhouse as an auditor and computer consultant before branching off on his own in 1988. The firm has enjoyed exceptional growth and recognition and continues to provide high quality tax, bookkeeping, payroll, and consulting services to small business owners. He excels in keeping the firm technologically on target and proactively staying one step ahead of his clients' needs. Steve enjoys travel, performing in live theater, ethnic dining, and spending time with his family.



Steven in the play *Fiddler on the Roof*

**Behind on Taxes?**  
 Download Your Free Business Financial Confidence Map™  
[AppletreeBusiness.com/map](http://AppletreeBusiness.com/map)

**Services We Provide**

- Payroll
- Bookkeeping
- Consulting
- Tax Services
- Confidence

"For over 10 years, Appletree has provided exceptional accounting services and business advice. Knowing that I don't have to think about taxes and compliance allows me to concentrate on running the business. It's a huge relief never having to worry."

**Karen Ferrandino**  
 Freedom Dental Arts LLC  
 Bedford, NH

**Your Partner In Business and Financial Success**  
 Call Steven Today  
 603-434-APPLE (2775)  
[steve@AppletreeBusiness.com](mailto:steve@AppletreeBusiness.com)

**We Ask Better Questions – We Provide Better Solutions**

## FAST FACTS PROFILE



**WE'VE GOT THE COMPETITIVE ADVANTAGE!**

*State-of-the-Art Technology Allows Us To Outperform Our Competitors*

**We Employ Layers of Technological Resources to Propel Our Clients To Efficiency & Success**

**VIP Immediate EMERGENCY Access to Your Appletree Advisor**  
 Contact us via a specialized procedure we provide only to VIPs!

**Online Meetings**  
 Our firm places a HIGH VALUE on your time. With any PC or mobile device, you can see, hear, and conference with us in real time.

**Cloud-Based Portal Communication Tool**  
 Our cloud platform permits 24/7/365 immediate & auto-encrypted access to all documents, files and communication with email notification. Your software and data are always available and retrievable from any location.

**Email is a Secondary Communication Tool**  
 How many unwanted emails do you plow through daily? Our technology notifies you directly and immediately, and uses an importance scale to alert you to what needs to be read now or reacted to later.

**Video & Screencast Communication Platforms**  
 We send you videos so you can SEE AND HEAR US on your PC, cell phone, or other mobile device. No more misinterpreting (voice mail messages, lengthy email explanations, snail mail communication) what we ask or share with you in regards to your documents! This saves time and increases efficiency.

**Cloud-Based Bookkeeping Software**  
 All clients get complimentary access to their accounting and bookkeeping data on our cloud computers as part of our Business Owners package. This includes free hosting of Quickbooks, Xero, or our free Professional Business Manager software.

**Advantages To Our Clients**

- Top-Notch Efficiency
- Up-To-The Minute Accuracy
- Increased Productivity
- Highest Levels of Security
- High-Speed Processing
- Increased Communication

"Bringing on Appletree Business Services has been one of the best business decisions we have made for our company. We highly endorse the level of commitment and professionalism that Appletree brings to the table!"

**Bryan Haaker**  
 Tandemkross  
 Hooksett, NH

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**Steven Feinberg, Owner**  
 @CPAsteve

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# Sales Tools Inspiration: Appletree Business Services



EMAIL SIGNATURE GRAPHIC



REFERRAL RESPONSE CARD



# Sales Tools Inspiration: ProfitWise Accounting

**Dave Heistein, CPA**  
Managing Partner  
O 619.819.0252  
dave@profitwiseaccounting.com

**About Dave:**

- Small Business Financial Consultant
- Highest Level of Client Service
- Dedicated / Responsive / Experienced
- Your Partner In Financial Success

**We Sincerely Appreciate Each And Every Referral!**

**If You Know Of Any Business Who Can Benefit From Our Professional Services, Please Send Them Our Way!**

**Protecting Profits — Producing Peace of Mind**  
[www.profitwiseaccounting.com](http://www.profitwiseaccounting.com)



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**Target Clients:**

- Small Business Owners
- Internet/Online Companies
- Professional Service Companies
- Business Service Companies
- Advertising/Marketing Companies
- Solo Entrepreneurs

**We Are The Small Business Growth Experts!**  
**Refer a Small Business For a Free Consultation.**  
**\$100 Visa Gift Card For Closed Referrals!**  
**619-819-0252**

I have a small business that provides consulting work all over the world. Profitwise has been able to deal with all of the issues I have thrown at them. I would highly recommend them to any small business looking for competent, professional accountants.

**Carol Lockhart, Geomatics, San Diego, CA**




REFERRAL RESPONSE CARD



**Dave Heistein, CPA**  
5752 Oberlin Drive, Suite #106  
San Diego, CA 92121  
O 619-819-0252  
F 619-839-3652  
dave@profitwiseaccounting.com

**Profitwise Services:**

- Part-Time/Outsourced CFO
- Bookkeeping/Payroll
- Outsourced Accounting Department
- Tax Planning & Preparation
- QuickBooks Consulting
- Wealth Building

**Company Goals:**

When it comes to selecting an accounting firm for your business, Profitwise Accounting strives to be the **best of the best**. We are whole heartedly dedicated to our clients' long-term financial success and peace of mind. Our mission is to help you define and achieve success by transforming financial chaos into order and prosperity.

**Grow Your Business!**  
**Call Dave Today!**  
**619-819-0252**

**Protecting Profits – Producing Peace of Mind**

**profitwise**  
accounting

[www.profitwiseaccounting.com](http://www.profitwiseaccounting.com)

**About Dave:**

- Highest Level of Client Service
- Dedicated & Confidential Advisor
- Entrepreneurial Experience
- Your Partner In Financial Success
- QuickBooks Pro Advisor



Dave Heistein, CPA started his career working in the accounting department of a large Fortune 100 Firm in NY. He later served as part of the founding team and CFO of several businesses in the Software and Internet Industries prior to his work at Profitwise Accounting. He is passionate about entrepreneurship and helping business owners achieve success in their businesses. Dave is a best-selling author, a licensed Certified Public Accountant, and also holds a BA degree in Business Economics from UCSB. Dave grew up in Silicon Valley and currently lives in San Diego with his wife and two daughters. His hobbies include surfing, scuba diving and golf.

FAST FACTS PROFILE

# Sales Tools Inspiration: Snyder & Company, PA, CPAs



**Dennis H. Snyder, CPA**

Silverside Professional Park  
1405 Silverside Road, Wilmington, DE 19810

Office: (302) 475-1600  
Fax: (302) 475-1609  
dennis@snydercpa.com

www.snydercpa.com

**Client Reviews**



"Dennis and his team continue to provide the expert structural support that has helped us grow our business from no employees to many, from seasonal to year-round operations, from in-person-only transactions to internet sales and deliveries."

— Ruth Linton, Member  
Highland Orchards, LLC  
Wilmington, Delaware

"We continue to benefit from choosing Snyder & Company. Their expertise and professionalism ensure accurate tax documents completed promptly. Their cordiality and responsiveness provides peace of mind!"

— Martin Sarkissian, Managing Director  
Inspired!  
West Grove, Pennsylvania

"My company's most important asset are its people, and I must include Dennis Snyder among them. He and his staff deliver general accounting, tax preparation, business counsel, and advice with professionalism and expertise. Their ethics, knowledge, value added services and, most importantly, friendship, make Snyder & Company a great firm to do business with!"

— Matthew Skomornucha  
ABC Sales and Service  
Wilmington, Delaware

"In the 15 yrs Kidz Ink has been in business, Snyder & Company has always been the answer to all our financial and accounting needs. Snyder & Company has been the most wise and valuable asset we have ever added to our company!"

— Felix R & Aretha D Kitson  
Kidz Ink Academy of Early Academics  
Bear, Dover, Middletown & Smyrna, Delaware

"Snyder & Company are very knowledgeable in all areas, and above-and-beyond in dedication. Their clients can count on fast, reliable service and a pleasant, professional environment."

— Mark & Tina Gillen  
Millcreek Metals, Inc.  
Wilmington, Delaware

"Confidence. Professionalism. Trust. Accuracy. Responsiveness. Attention to detail. These are the things I look for in an accounting firm, and Snyder & Company has more than excelled for the 20 plus years that I have used their services. I highly recommend them!"

— Roger Malatesta, President  
Professional Recruiting Consultants, Inc.  
Wilmington, Delaware

— John R. Strojny, President  
NB Retail Management, Inc.  
Wilmington, Delaware



**SNYDER & COMPANY, PA, CPAs**

*We Are Committed To The Success Of Your Business!*

TESTIMONIAL SHEET

**Worry-Free  
Hassle-Free**

**Full Service  
Payroll**

**Worry-Free Payroll:**

- Designed For Small Business
- Check Processing/Direct Deposit
- W-2s/Year-End Reporting
- Complete Compliance
- All Tax Deposits & Filings
- Online/Paperless/Easy/Secure
- Dedicated Payroll Professionals
- Eliminate Penalty Risks

**Hassle-Free Process:**

- You Call, Fax or Enter Data Online
- We Process Payroll
- We Complete Tax Deposits/Filings
- We Take Care of Tax Reporting
- You Run Your Business!

Have you spent countless hours managing payroll, even while on vacation? Have you incurred IRS fines? Have you used a payroll software that leaves you with the burden of filing and paying taxes?

**Take Time-Consuming Payroll Tasks Off Your List!**

Comprehensive Payroll Processing  
Timely Tax Payments Insures IRS Compliance  
Fast, Accurate, Simplified Pricing

**Call Snyder & Company CPA's Today!  
302-475-1600**

Our team of payroll professionals keep up with changing payroll regulations, answer any questions, and keep you penalty free! You concentrate on running your business – We'll run your payroll!

**Testimonial:**

"My company's most important asset are its people, and I must include Dennis Snyder among them. His company's services are not only needed but appreciated. He and his staff deliver general accounting, tax preparation, payroll services, business counsel, and advice with professionalism and expertise."

— Matthew Skomornucha, ABC Sales and Service  
Wilmington, Delaware



**Dennis H. Snyder, CPA**

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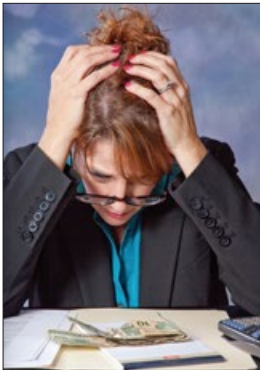


**SNYDER & COMPANY, PA, CPAs**

SALES SHEET




## Sales Tools Inspiration: Rosenfeld & Company CPAs



### Why Struggle With Time-Consuming Accounting Tasks?

Turn frustrating, time-consuming bookkeeping and accounting chores over to our staff. Experience worry-free accounting and focus on building your business. Partnering with Rosenfeld & Company CPAs ensures compliance gives your business cost effective financial expertise.



**Our Clients:**

- Save Time/Increase Efficiency
- Minimize Tax Liabilities
- Get Financial Advice
- Easily Access Current Data
- Have More Fun


**Our Services:**

- Accounting/Bookkeeping/Payroll
- Tax Prep/Tax Planning
- QuickBooks Pro Advisors
- IRS Representation




Save yourself from the worry of potentially costly financial mistakes. Our experienced, professional staff is diversely trained and will proactively monitor your daily financials. While you're busy running your company, we'll do all the number crunching behind the scenes!

We want to be a component of your success, and will always treat your business as our own. We are the business partner you've been looking for!

**Be Calm – Call Rosenfeld Today!**  
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[www.rosenfeldandco.com](http://www.rosenfeldandco.com)



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Office: 704-873-0542  
Fax: 704-873-4358

**Full Service Accounting • Legendary Customer Service**

SALES SHEETS

## TAX DUE DATES

Understanding your business's tax environment is critical to your everyday business situation and cash flow planning. Taxation filing dates, both business and payroll, are vital deadlines.

### Rosenfeld CPA Tax Advisors

- Easy Reminder System for Tax Due Dates
- All Tax Filings Prepared
- Stay in Complete Compliance

Our proactive, experienced tax advisors will provide a packet with detailed instructions on our easy tax filing process. **At tax time, all you do is sign the forms and attach your payment.**



**Important Tax Due Dates:**

- ❑ Payroll Tax Deposits – due either monthly, semi-weekly, or weekly (depending on your payroll schedule and payroll dollar volume)
- ❑ C-Corporation Income Tax Deposits – due April 15th, June 15th, September 15th, and December 15th
- ❑ Individual Estimated Income Tax – due on April 15th, June 15th, September 15th, and January 15th

NOTE: Tax Due Dates Falling on a Saturday, a Sunday, or Legal Holiday Are Extended Until the Next Business Day.

**Be Tax Savvy – Call Rosenfeld Today!**  
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"You get much more than what you would expect from this top-notch CPA team. Honesty, integrity, and the highest of professional ethics are their credo. Their personalized service makes you feel more a part of the family than a mere client. If you want prompt, efficient, knowledgeable, safe, personalized and ethical CPA services, come to Rosenfeld and Company."

Gary Robinson, MD  
Statesville, NC

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## Sales Tools Inspiration: Rosenfeld & Company CPAs

# ENERGIZE YOUR BUSINESS



**Getting Bugged Down With Everyday Financial Issues  
Can Zap the Energy Out of Your Business!**

Rosenfeld & Company CPAs will guide your firm to its highest and most efficient level of operation. Our streamlined programs eliminate recurring problems and keep the financial areas of your business running smoothly 24/7. With worry-free accounting in place, you have less stress and more energy to focus on what you do best!


**The Rosenfeld  
Team Advantage**

- Trusted Team of Business Advisors
- Proactive Tax Specialists
- Accounting/Bookkeeping/Payroll
- Tax Filing/Tax Prep

At Rosenfeld & Company, we emphasize that "CPA" signifies Close Personal Attention. We are dedicated to providing proactive advice and the highest level of service to you. We are committed to the financial success of your business. Above all, we value our lifelong relationship with you!




"Rosenfeld and Company is a superb accounting firm. They have met my needs over the years, have kept me informed of necessary changes I need to make in my business to keep in compliance, and they have done so with a very professional and pleasant approach. I have never felt like a number there, even though I do have a client number. Regardless of your client number, you will always feel like you are client #1!"

Phil Evans  
Evans & Associates Consulting Group, Inc.  
Matthews, NC



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## Sales Tools Inspiration: Dean Vance, CPA



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A Secret!

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& Colleagues Know  
About Our Services!

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**Target Clients:**

- Small Business Owners
- Internet/Online Companies
- Professional Service Companies
- Business Service Companies
- Advertising/Marketing Companies
- Solo Entrepreneurs

"With both our business' monthly accounting and tax management and our personal tax management, Vance and Associates has been impeccable! We have been extremely impressed with the timeliness in which our tax issues have been addressed. Your firm is by far the best we've worked with!"

Chesmore and Tamara Crump  
Pro Martial Arts, Drexel Hill, PA



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**We Are The Small Business Growth Experts**  
Kindly Refer Any Small Business Owners  
To Us For Accounting & Tax Needs!

**267-352-5000**  
<http://www.deanvancecpa.com/referrals.htm>

DeanVance, CPA 267-352-5000 [dean@deanvancecpa.com](mailto:dean@deanvancecpa.com)

REFERRAL RESPONSE CARD

## Sales Tools Inspiration: Akopyan & Company CPA

# AKOPYAN & Co.

Certified Public Accountant

315-1st Ave West, Ste. B, Seattle, WA 98119  
Office: 206-838-3800 Fax: 206-838-3803  
yuriy@ygacpa.com info@ygacpa.com Yuriy G. AKOPYAN, CPA

www.ygacpa.com

f t in

### Why AKOPYAN & Company, CPA?

- Responsive/Proactive Staff
- Full Array of Accounting Services
- High Performance Standards
- Experienced/Friendly/Affordable

### Services

- Accounting/Bookkeeping/Payroll
- Tax Planning/Tax Preparation
- Accounting Software Setup/Training
- Strategic Business Planning
- Resolution of IRS Issues

"Yuriy and his staff have become trusted partners with us in managing our small business. We always feel supported and respected and we know they have our best interest at heart. There's nothing more important for us as small business owners than having the smart, knowledgeable, and gracious group at Akopyan and Company as partners, ready to help at any given moment. Thanks, Akopyan and Company!"

~ Larry and Lily Mandel  
Larry Mandel Real Estate Corporation  
Sammamish, WA

### Let's Have a Chat About Growing Your Business!

206-838-3800

### AKOPYAN & Company, CPA – Boosting Your Profit Potential!

### Why Yuriy AKOPYAN, CPA?

- Insight/Expertise/Professionalism
- Small Business Focus
- Lifelong Client Relationships
- Committed to Exemplary Service

### About Yuriy

Yuriy Akopyan earned his CPA designation with the State of Washington in 2002. Before founding Akopyan & Co. in 1999, he worked as a tax software developer and an analyst at Microsoft and SCS Compute Corporations, where he developed income tax preparation software for end-users and CPA firms. Today Yuriy's diverse trained and talented staff helps small businesses achieve their financial goals and minimize their tax liabilities. With a holistic and dedicated approach to his clients, and the philosophy that no client is too small to receive exemplary personal service, Yuriy has gained hundreds of lifelong clients in the Seattle area. Akopyan & Co. is the one-stop shop businesses need for tax, accounting, and financial advisement.



To give back to the community, Yuriy does charitable work for the Armenian community in the greater Northwest. He enjoys traveling, fine dining, and playing soccer with his son.

FAST FACTS PROFILE

# AKOPYAN & Co.

Certified Public Accountant

Yuriy G. AKOPYAN, CPA  
315-1st Ave West, Ste. B, Seattle, WA 98119  
Office: 206-838-3800 Fax: 206-838-3803  
yuriy@ygacpa.com  
info@ygacpa.com  
www.ygacpa.com

g+ f t in

### Why AKOPYAN & Company CPA?

- Small Business Expertise
- Committed to Excellence
- Tax-Savings Specialist
- Two Decades of Industry Experience

**Kindly Refer Us To Friends, Family & Colleagues Who Could Use Our Professional Services!**

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## Sales Tools Inspiration: Misc. Tools

# Is Your Business Healthy?

**Ask Yourself These Diagnostic Questions To Determine If You Need a Business Checkup:**

**Have You Had Tax Surprises?** Don't let your business be stressed out by a high and unexpected tax liability! Unexpected interest and/or penalties due to poor tax planning result in a cash flow drain that disrupts your business.

**Have You Had To File Extensions?** Businesses need their tax returns filed on time. This ensures better and quicker year-end numbers AND better budgeting. Filing promptly lessens the likelihood of penalties and interest!

**Have You Received Tax Notices?** If you have received IRS or state tax notices about inaccuracies or late payments, you know that responding to these notices is very time consuming!

**Are You Interested In Increasing Your Tax Savings and Business Profits?** Proper tax planning increases cash flow to grow your business. Ensure that you are getting every tax break available to your business. We show you how to keep more of your money!

**Are You Managing Your Business By The Numbers?** Numbers don't lie! Accurate, up-to-date financials are objective and give you the clarity you need to manage your business properly. We always have our finger on the financial pulse of your business and are eager to discuss how to move your business forward!

**Do You Have Work/Life Balance?** Many business owners work too much and have little free time. We take care of your financials so you can passionately pursue your business goals and take some vacation. We save you time, money, and give you peace of mind!



At Bordeaux & Bordeaux CPAs, we monitor the health of your business all year long. Schedule a meeting with Donna today and we will assess your tax waste and missed opportunities. Donna will give your business a thorough checkup to see how we can help your business reach its true potential.





**BORDEAUX & BORDEAUX**  
CERTIFIED PUBLIC ACCOUNTANTS

**DONNA L. BORDEAUX, CPA**

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BORDEAUX & BORDEAUX CPA  
SALES SHEET


# We Love Referrals!

**Your Trust In Us Is The Highest Of Compliments!**

At Chassey Associates we are passionately committed to client success. We have built our company providing personalized business advisory, accounting and tax preparation service to businesses and individuals. We believe in lifelong relationships – so when a client signs with us, our entire team works daily to earn and keep their trust. If you know someone who could benefit from our professional services, please refer them to us!

**We Help Clients Who:**


- Seek Tax Minimization
- Want to Take Their Business To The Next Level
- Need Timely, Personalized Service
- Desire Efficiency Through State of the Art Technology
- Need A Caring Accountant Who Listens
- Want Expert Help In Sorting Out Their Accounting
- Want to Keep More of What They Earn



**Business Is Great . . . .  
And We're Looking For More!**


Please introduce us to your family, friends, co-workers and business associates. Anyone you refer will receive the highest degree of professional courtesy possible.

**Thank you for your trust!**






Richard Chassey

**Please Send Your Referrals To: [rick@chasseycpa.com](mailto:rick@chasseycpa.com)**



3550 Round Barn Blvd., Suite 210, Santa Rosa, CA 95403  
Office: 707-588-0914 Fax: 707-544-3268  
[rick@chasseycpa.com](mailto:rick@chasseycpa.com)  
[www.chasseycpa.com](http://www.chasseycpa.com)

"We are happy to take our business to an accountant who listens. The personalized attention and timely, quality service even in pressure situations makes Chassey Associates the best choice for accounting services."

- Stan DuBois, President  
Instrument Technology Corporation, Cotati, CA

**Committed To Superior Client Service • Laser-Focused On Client Success**

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## Sales Tools Inspiration: Misc. Tools

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**Business Is Great...  
And We're Looking  
For More!**

Please introduce us to your family, friends, co-workers and business associates. Any referral you send us will receive the highest degree of professional courtesy.

**Thank you for your trust!**

"John and his team have helped us from the start of our business. John is very personable and genuinely cares about his customers. The Paragon staff has gone out of their way to find any tax savings they can for us while at the same time staying on top of my monthly sales tax. Everyone at the office is super supportive!"

Caron Catalan  
Papa P's Restaurant  
Woodstock, Georgia

**Your Trust In Us Is  
The Highest Of Compliments!**

At Paragon Accounting & Tax, we are passionately committed to client success. We have built our company by providing personalized business advice as well as accounting and tax preparation services to businesses and individuals. We believe in lifelong relationships; therefore, when a client signs with us, our entire team works daily to earn and keep his or her trust. If you know someone who could benefit from our professional services, please refer him or her to us!

**Clients Who Can Benefit From Our Services:**

- Clients Looking For Tax Minimization
- Business Owners Ready To Take Their Business To The Next Level
- Clients Who Want Timely Service
- Businesses That Desire Efficiency Through State-of-the-Art Technology
- Clients That Need A Caring Accountant Who Listens
- Business Owners Who Are Looking For Help In Sorting Out Their Accounting
- Clients Who Want to Keep More of What They Earn

**Please Send Referrals To: johnd@paragonat.com**



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[www.paragonaccountingandtax.com](http://www.paragonaccountingandtax.com)

**John T. Drawdy, Jr., CPA**

232 Creekstone Ridge  
Woodstock, GA 30188

O: (770) 928-7229  
F: (770) 591-0789  
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TEAM**

**Steve Schneider, CPA**  
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513.779.2382 office | 513.779.2386 fax  
[steve@rnsacct.com](mailto:steve@rnsacct.com)  
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- Bookkeeping & Accounting
- Payroll Processing
- Tax Planning & Prep
- Small Business Consulting



**WHY CHOOSE  
STEVE SCHNEIDER?**

- Trusted Business Advisor
- Client Service Oriented
- Consultative Approach
- Understanding Your Needs

Steve Schneider brings over 20 years of experience in the public accounting industry. His client businesses come from a variety of industries such as medical, professional services, retail, real estate, manufacturing, and distribution. Steve is a licensed CPA in Ohio. He is a member of the American Institute and Ohio Society of CPAs.

Steve graduated from the University of Cincinnati with a Bachelor of Science in Accounting. He is a BMW enthusiast, avid runner and a foodie.

**ABOUT RETHLAKE & SCHNEIDER CPAS**

One of Rethlake & Schneider CPAs specialties is small business accounting. Whether you need payroll services, tax return preparation, or general accounting, Rethlake & Schneider CPAs can help you and your business.

Let us know exactly how we can work best with your company to serve your individual needs. We provide up-to-date information on how tax law developments affect small businesses directly and help you meet your tax obligations.

Here at Rethlake & Schneider CPAs, we are always eager to start working with new Ohio businesses, and we would be happy to answer any of your questions regarding small business accounting.

**Don't cut corners when  
IT COMES TO YOUR FINANCES.**

I am able to focus on growing my company,  
**BECAUSE RETHLAKE & SCHNEIDER KNOWLEDGEABLE STAFF WORKS DILIGENTLY  
IN ORDER TO HAVE MY COMPANY'S FINANCIAL RECORDS IN ORDER.**

- Zak Nardykwa Holistic Fitness



ATOMIC ACCOUNTING  
SALES SHEET



# UNDERSTANDING COMPETITIVE ADVANTAGES



*Distinction is a condition of being different... a distinguishing feature.*

In many of your marketing materials, sales collateral pieces, and websites, you are great at **STATING FACTS** about yourself and your company. When we apply the definition of distinction, and **REALLY** understand what it means, many of us find out that instead of being distinctive, all we are really doing is stating facts. Stating the same facts that everyone else in your industry states **makes your marketing run-of-the-mill** and **that can be dangerous!**

**This guide will shed light on what distinction really is and offers some great suggestions for what might become your very next Competitive Advantages one-page sales sheet.**



## Competitive Advantages: EXTERNAL USE EXAMPLE

### *Competitive Advantages Our Firm Has & Uses...*

*Great for presenting to the **EXTERNAL WORLD** in a one-page sales sheet for prospects, customers, clients, an email TOMA piece, and on a webpage.*

#### **VIP Immediate EMERGENCY Access to Business Owner or Salesperson**

Contact us via a specialized procedure we provide to all of our VIPs!

#### **24/7 Immediate Access to Customer Service Phone Number**

Contact our 24/7 Customer Service line to get help when you need it!

#### **Cloud-Based Communication Tool**

You can have 24/7/365 immediate & auto-encrypted access to all documents, files, and communication with notification via text message or email.

#### **Email is a Secondary Communication Tool**

Avoid unwanted emails! We use a system that notifies you directly and uses an importance scale—so you know what to read now or save.

#### **Video Communication Platform**

We utilize the latest in technology and send you videos so you can **SEE AND HEAR US** on your PC, cell phone, or other mobile device.

#### **Screencast Communication Program**

No more misinterpreting (voicemail messages, lengthy email explanations, snail mail communication) what we ask or share with you in regards to any of your documents! You will **SEE AND HEAR US** all while following a pointer on your screen that is overlaid on the documents—saving all of us time.

#### **Online Meetings**

Our firm places a **HIGH VALUE** on your time. With any PC or mobile device, you can see, hear, and discuss with us in real-time, including viewing your important documents. Better yet, our meeting is recorded and we send you the recording link immediately after we meet with you!

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# Competitive Advantages: INTERNAL USE EXAMPLE

## **Competitive Advantages Our Firm Has & Uses...**

*This guideline is for **INTERNAL USE** to ensure that you and your entire company understand and handle each of your competitive advantages systematically.*

### **VIP Immediate EMERGENCY Access to Business Owner or Salesperson**

- Utilize “**E**” via text message. Use a cell phone rotated between staff.
- Create a Flyer / Create guidelines for this specific action.
- With the flyer and guidelines set **SPECIFIC EXPECTATIONS FOR THE CLIENTS/CUSTOMERS.**
- Back up **ALL** communication with Covideo or Screencast.
- Do not date or time stamp so it is repeatable.
- Incredibly **DISTINCTIVE**—you can **COUNT ON** your competition **NOT** using this.

### **24/7 Immediate Access to Customer Service Phone Number**

- Use a cell phone given to different staff members to monitor.
- Clients’ perceptions play a big role with this.
- Create a Flyer / Create guidelines for this specific action.
- With the flyer and guidelines set **SPECIFIC EXPECTATIONS FOR THE CLIENTS/CUSTOMERS.**
- Back up **ALL** communication with Covideo or Screencast.
- Do not date or time stamp so it is repeatable.
- Incredibly **DISTINCTIVE**—you can **COUNT ON** your competition **NOT** using this.

### **Cloud-Based Communication Tool**

- 24/7/365 Immediate & Secure Access to All Documents / Files / Communication
- Auto-Encrypted & Highest Level of Security
- Ease of access to your data—even via your cell phone.
- One-stop shop: one webpage contains all your data.
- Sorted Via Level of Importance: **E**mergent / **U**rgent / **N**on-**U**rgent
- Include Deadlines and % of Completion.
- All messages pinged via cell phone or email.
- Incredibly **DISTINCTIVE**—you can **COUNT ON** your competition **NOT** using this.

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## Competitive Advantages: INTERNAL USE EXAMPLE (CONT.)

### Email is a Secondary Communication Tool

- All companies heavily rely on email.
- Most prospects, customers, and clients do not pay attention to email anymore.
- Hundreds of emails are missed by everyone each day.
- Email is becoming outdated and replaced by better technology.
- Capitalize on this by stating this to your clients.
- Incredibly **DISTINCTIVE**—you can **COUNT ON** your competition **NOT** using this.
- Only effective if you are using something that replaces email like a cloud-based platform.

### Video Communication Platform

- Reading is laborious and boring.
- Text and email messages are a thing of the past.
- Our clients see us and hear our messages via video platform tool.
- Video messages are visual and effective.
- Your prospects and clients will **REMEMBER** your video.
- Clients get to replay message if they need more clarification.
- Tracking system allows you to know how many views per video.
- Incredibly **DISTINCTIVE**—you can **COUNT ON** your competition **NOT** using this.
- Set up repeatable internal and external videos.
- This is an incredible time saver.
- Video platform has a cell phone app—cut a video anytime.
- Send a **QUICK** video follow-ups immediately following your appointments—from the parking lot!

### Covideo Video Communication Platform

GO TO [WWW.COVIDEO.COM](http://WWW.COVIDEO.COM) TO  
TAKE ADVANTAGE OF THIS  
LIMITED-TIME OPPORTUNITY!

### Premium Plan

Take \$10 Off Per Month  
(Normally \$49 Per Month)

Use Coupon Code:  
**chuckbauer10**

### Enterprise Plan

Take \$20 Off Per Month  
(Normally \$99 Per Month)

Use Coupon Code:  
**chuckbauer20**

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## Competitive Advantages: INTERNAL USE EXAMPLE (CONT.)

### Screencast Communication Platform

- Precise Communication Tool.
- Ability to overlay your voice over **ANY** document on your screen.
- Can overlay voice over multiple documents into one screencast.
- Creation of a private URL for the viewer.
- Your prospects and clients will **REMEMBER** your screencast.
- Tracking system lets you to know how many views per screencast.
- Set up repeatable internal and external screencasts.
- This is an incredible time saver.
- Ability to Respond to **MOST** emails using Screencast.
- Overlay any size frame—just drag and resize.
- HD Quality with built-in editing tools.
- Use **YOUR** Logo and use **YOUR** domain Name.
- Incredibly **DISTINCTIVE**—you can **COUNT ON** your competition **NOT** using this.

### Screencast-O-Matic Screencast Communication Platform

GO TO [WWW.SCREENCAST-O-MATIC.COM](http://WWW.SCREENCAST-O-MATIC.COM) FOR A PRO ACCOUNT AT \$15 PER MONTH!

### Online Meetings

- Utilize the WebEx Platform—you already know this platform!
- Low monthly fees.
- Reach outside of your self-imposed box and get with the program—use it all the time!
- Incredibly **DISTINCTIVE**—you can **COUNT ON** your competition **NOT** using this.
- You need to find ways to use it and after 4 or 5 WebEx sessions, you become an expert!

### WebEx HD Online Meeting Platform

GO TO [WWW.WEBEX.COM](http://WWW.WEBEX.COM) FOR AN ACCOUNT STARTING AT ONLY \$19 PER MONTH!

**Need someone to help you do a WebEx test?**

Don't Procrastinate—Contact Us ASAP at 855.740.SELL!

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**Our Online Learning Center delivers proven success strategies to your home or office—any time of the day or night!** Get ahead of your competition without having to adjust your busy schedule!



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## Sales Training

**Learn to make more money, close more sales, and attract more customers!** Chuck Bauer's top-secret training strategies and proven sales techniques will bring immediate revenue-producing results!



## Business Consulting

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## Capture Attention & Capture Sales!

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With the expertise of **New Connections 4 Business** at your side, you will have a customized set of sales tools to use in all your marketing or TOMA campaigns. Every piece contains on-target content, sales distinctive formatting, high-resolution graphics, and Sales / Business Coach Chuck Bauer's guaranteed formula for success.



**Call Lynn Barrett if you want high-quality, revenue-producing sales tools designed “the Chuck Bauer way!”**

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- Fast Facts Profiles
- Main Point Cards
- Referral Response Cards
- Sales Sheets
- Testimonial Sheets
- Email Signature Graphics
- Discovery & Conclusion Agendas
- Competitive Advantages Sheet
- Recruiting Flyers & Career Packages
- ...and much, much more!