

HOW TO EARN POINTS?

SERVICES

15 Points - Estimated tax vouchers as a part of tax return (\$75 regular price)

15 Points - W-4 optimization (\$195 regular price)

25 Points - All other services not mentioned

25 Points - Single tax return costing less than \$400

50 Points - IRS problem resolution - single case (\$300 - \$900 regular price)

65 Points - Any project \$401 - \$600

75 Points - Annual tax planning (\$1000 regular price)

75 Points - One full year of payroll services (\$500 - \$1000 regular price)

85 Points - Any Project \$601 - \$800

100 Points - Single individual tax return costing more than \$800

120 Points - One full year of business advisory services (\$1500-\$6000)

120 Points - IRS field audit representation (\$1500 - \$3000)

120 Points - One full year of bookkeeping services (\$1500-\$6000)

150 Points - One full year of packaged business services (\$3000-\$15000)

300 Points - One full year of packaged business services (\$15000)

ACTIONS

10 Points - Paying invoice within 7 calendar days from receipt

10 Points - Completing and signing tax organizer

15 Points - Connecting on LinkedIn to Mike and writing a recommendation for him on his profile

20 Points - Scanning and uploading tax documents to client portal in lieu of appointment for existing clients

25 Points - Davidoff VIC Loyalty Reward Program Sign Up Bonus Points

30 Points - Doing business with our trusted business partners

50 Points - Referring a single new paying individual client

85 Points - Referring a single new paying business client

CLIENT LONGEVITY

50 Points - 1-3 years Client Longevity

75 Points - 3-5 years Client Longevity

100 Points - 5-7 years Client Longevity

130 Points - 7-9 years Client Longevity

165 Points - 9-15 years Client Longevity

200 Points - 15 years Client Longevity
