

This is Why our Due Diligence for Solutions is the Best

For 25 years, our due diligence team of top-tier CPAs and attorneys has evaluated cost-saving solutions. We have 100s client references and saved our clients \$3.5 billion.



As the creators of this community and an 8-step due diligence system, **we provide vetted solutions that double client profitability while reducing risk.**

How do C-Suite Executives Benefit?

We partner with C-Suite Execs (CFO, CPA, CEO, CIO) and offer these vetted solutions to your clients at no upfront cost or obligation. Ask about our lucrative fractional C-Suite model.

The 6 Steps C-Suite Executives & your Clients take to Evaluate any of our Vetted Solutions

1. Assess Client's Suitability: The advisor (CFO, CEO, CPA) books **a 15-minute call** with us, and collectively we determine which cost-saving solutions are most appropriate.

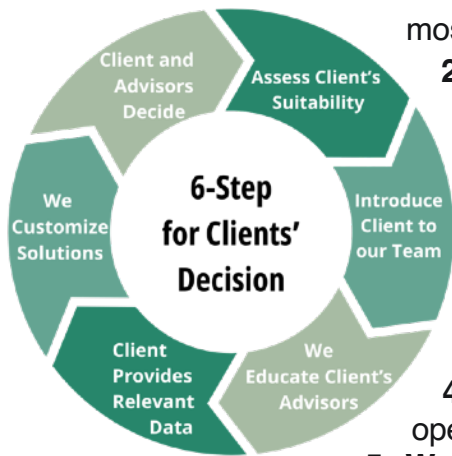
2. Introduce your Client to our Team: The advisor introduces our team of experts to the business owner client on a Zoom or phone call. We provide a brief overview of our services and seek permission to educate the client's advisors (such as their CPA or attorney) on the solutions the client is interested in without any cost or obligation.

3. We Educate Client's Advisors: Our experts educate the prospective clients' current advisors at our expense.

4. Client Provides Relevant Data: The client/advisor shares operational data for scenario analysis and value quantification.

5. We Customize Solutions: We specialize in developing customized solutions for business owners that can help them double their profitability.

6. Clients and Advisors Decide: Your client-advisor team can make better decisions with relevant information on the best solutions.



Minimum Qualifications: \$3 million in net income and 100+ employees.

In 2020 the Democrats passed a Tax Platform doubling federal long term capital gains taxes to 39.6% and eliminating the step-up in basis. Click [here](#) for TaxFoundation.org PDF summary (page 2) of the full list of these many tax increases.