



CARLY & CRAIG

CANNABIS



CLIENT CHARACTERISTICS

- Have set up business with multiple entities for growing, employee management, and land ownership to be able to take advantage of tax programs
- NOT carrying forward losses, net revenue \$150K+
- Are always innovating
- Qualified for ERC, looking to expand fast

PRIMARY SERVICES, SAVINGS, COMMISSIONS

SERVICE	SAVINGS	TOTAL COMMISSIONS	LG COMMISSIONS
R&D	\$104K per \$1 million payroll, 10.4%	\$2,730 per million	\$1,365 per \$1 million
Cost Segregation	\$74K per \$1 million 7.4%	\$1,100 per \$1 million	\$550 per \$1 million
Merchant Services	1-4% off of current	22% of \$ received by processor	\$220 per month for every \$100K in charges
ERC Fast Funded	Based on ROI	2-4% of Credit Funded	1.5% of Credit Funded is Goal
AI Tax Strategy	\$10K to \$100K+	\$3,000 for every \$100K	3% of Savings

EXAMPLE

Carly & Craig qualified for \$2 million in ERC and get 70% funded. They have a separate company set up that focuses on innovation and invest about \$2.5 million in payroll there and have invested \$3 million on facility build and renovations in the last 5 years through their property management entity. They process \$150K per month on credit cards and Saved \$150K from AI Tax Strategy. **Total LG Commission Year 1 = \$34,510**