

ROSIE RESTAURANT



-OR-

DANNY DINER



CLIENT CHARACTERISTICS

- Ideally own property and have invested over \$500K between purchase and renovations
- Annual revenue of \$1 million+
- NOT carrying forward losses, net revenue \$150K+
- HUGE amount of turnover

PRIMARY SERVICES, SAVINGS, COMMISSIONS

SERVICE	SAVINGS	TOTAL COMMISSIONS	LG COMMISSIONS
AI Tax Strategy	\$10K to \$100K+	\$3,000 for every \$100K	3% of Savings
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
WOTC Hiring Credits	\$900-\$9,600 per qualified hire Yr 1	\$135 for every 10 @ 50% qualification	\$68 / Yr per 10 hires @ 50% qualification

EXAMPLE

Rosie owns 3 locations and 3 properties. She has invested \$750,000 in one and \$500,000 in another in the last 3 years. She processes about \$3.2 million annually in credit cards and hires about 50 employees per year. Her AI Tax Savings was \$50K.

Total LG Commission Year 1 = \$9,977