

The Basics & Beyond Tax Planning Newsletter is a one-time, cost-effective way to inform your clients about current tax planning opportunities. Among the many benefits you will realize when you use this proven business-building newsletter are:

### Remind your client why you are their tax professional!

- ▶ Provide your clients with the latest tax information about 2017 tax law changes for individuals, tax strategies and tax planning opportunities.
- ▶ Ample room for you to imprint your firm name and address. Use this marketing tool to strengthen your client relationships and encourage referrals.
- ▶ Low cost. Electronic copy for only \$75.
- ▶ Practical, easy-to-understand material. Written by experts, in the true Basics & Beyond tradition.
- ▶ An economical and effective way to place your name in front of your clients.

### Let us help you grow your practice!

- ▶ Your clients will get concrete facts, not hype.
- ▶ You will provide the good solid tax information that your clients already expect from you.
- ▶ Assembling this type of information is our business and you can count on us to do it well.
- ▶ Your letter will deliver that accurate tax information in an easy-to-understand format.
- ▶ You could draft your own letter, but why bother? For only \$75, you avoid spending many hours from your busy schedule to create it.
- ▶ We even provide you with the same information in a letter format so that you can produce a personalized letter for each client if you prefer not to use the newsletter format

### Registration form

Mr/Mrs/Miss/Ms: \_\_\_\_\_

Company/Firm: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: ( \_\_\_\_\_ ) \_\_\_\_\_ FAX: ( \_\_\_\_\_ ) \_\_\_\_\_

E-mail: \_\_\_\_\_

Check all that apply:

- Attorney
- CFP
- CPA
- EA
- RTRP
- Tax Preparer

### Payment information

Amount due: \$75

Check enclosed. Please make checks payable to "Basics & Beyond."

Charge my credit card: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Security Code\*\*: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ / \_\_\_\_\_

Cardholder Name: \_\_\_\_\_ Signature: \_\_\_\_\_

\*\* Security Code: Visa, Discover and Mastercard – Last 3 digits of the numbers on the back of the card signature panel. American Express – The 4-digit code on front of card above and to the right of the main card number.

**FAX to:** (727) 210-6604

**MAIL to:** Basics & Beyond 2605 Enterprise Rd. East Suite 150 Clearwater, Fl. 33759

**SCAN to:** support@cpehours.com

**Or Call:** 1-800-664-8297