

INVESTMENT

STRATEGIZING

**1-2 Hours
Per Year
Per Client**

COST

**\$400 Per Year
Per Tax Advisor**



CULTIVATING

**8-10 Hours
Per Year
Per Tax Advisor**

VALUE ADD

**20 Minutes Per
Client Per Year**

REVENUE MODEL

Investment Cost

- Strategizing Hours: **\$131,250**
- Cultivating Hours: **\$63,000**
- Annual Cost: **\$11,200**
- Value Add: **\$4,042**

Assumptions:

4 Tax Advisors, 50 clients, \$250 per Advisor hour at 1.5 hours per client, \$35 per Operations hour, 7 years, a 1.25% fee per year, and \$400 per year

Investment Return

- Annual Revenue: **\$400,000**
- Total Revenue: **\$2,800,000**
- Net Revenue: **\$2,590,507**
- Return on Investment: **1,237%**