

How to Sell Tax Planning Without Becoming a Sales Representative

Anton Anderson, Evan Anderson, & Tim Gacsy
Elite Resource Team



How to Sell Tax Planning Without Becoming a Sales Rep



Anton Anderson
CEO, Elite Resource Team
CEO, VFO Services



Evan Anderson
Proactive Facilitator,
VFO Services



Tim Gacsy
CPA, PFS, MBA, MBT, CGMA
Director Advanced Tax Planning,
VFO Services

Tax Planning Track Record - 2025 & 2026

- **\$571,475 total earned from Tax Planning**
 - **\$22,205 average Tax Planning Fee** per client
- **\$3,698,507 total earned from Tax Plan Implementation**
 - **\$17,002 average Revenue Share from Specialists** resulting from Tax Planning clients that implemented strategies
- **\$4,269,982 total tax combined** tax planning + rev share

This isn't Theory.
These are Results.

VFO Tax Planning Frame

Our goal of this presentation is to help in either way:

- **Learn from our VFO Tax Planning:** If you love your process - keep it. We'll share what we're doing so you can compare notes.
- **Leverage our VFO Tax Planning:** If you'd rather just use our team and process, great we can do that.



Our Typical Clients



Types of Clients

Income Tax Planning Clients

- AGI of \$500k+
 - Lower for high income states
- Tax liability of \$100k+



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One-Time Opportunities

- Taxable gain \$1m+
 - \$500k+ as exception
- Business exit
- Asset sale
- Stock options / RSUs
- Lawsuit, lottery, inheritance
- Hidden tax problems
 - Ex. large qualified accounts

VFO SERVICES



VFO SERVICES — TAX PLANNING

Tax Planning Process

From first contact to full implementation

TAX PLANNING PROCESS

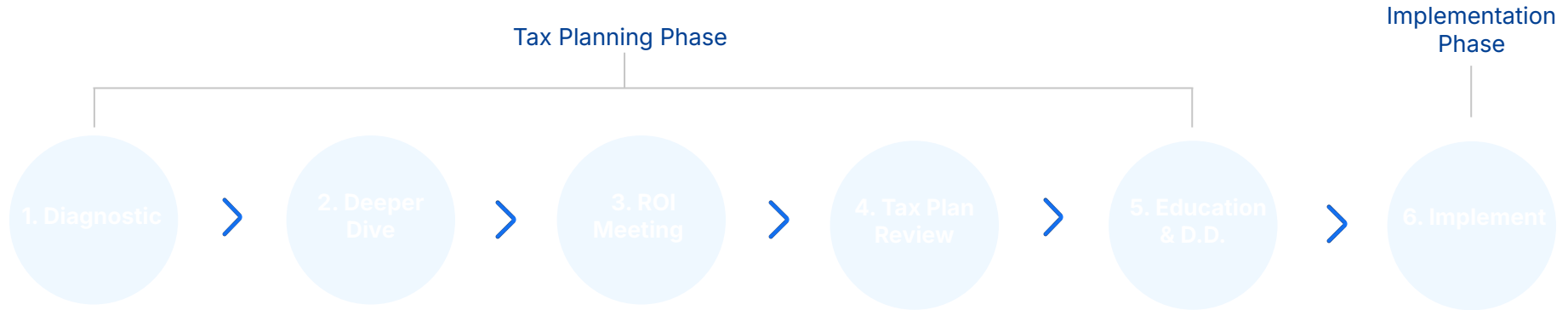
“In America, there are
two tax systems: one
for the informed and
one for the uninformed.
Both are legal.”

-Judge J. Learned Hand; U.S. Court of Appeals
for the Second Circuit



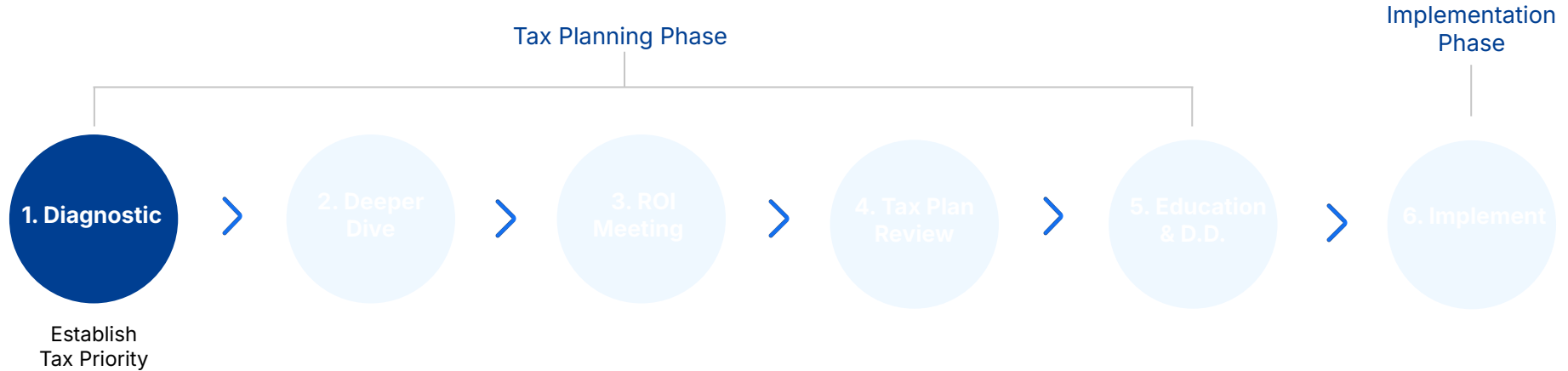
TAX Proactive Planning

6 TAX PLANNING STEPS



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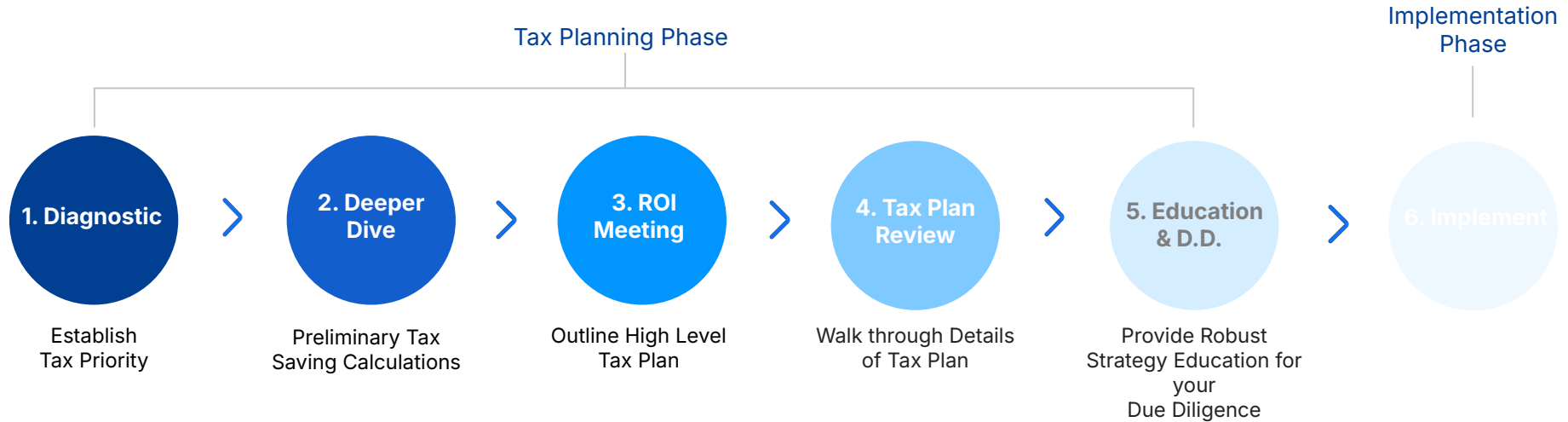
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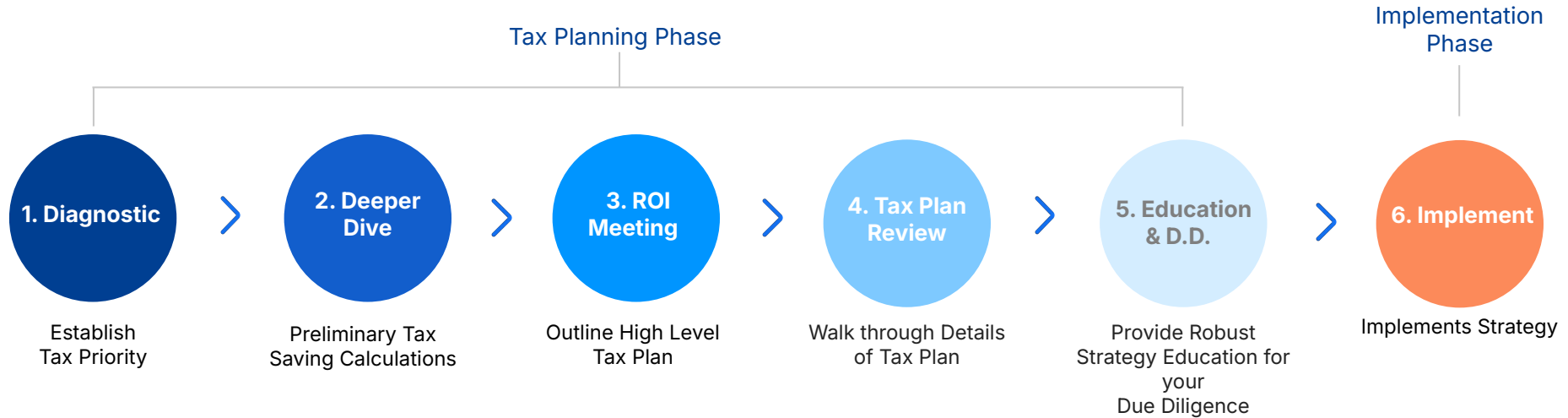
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TAX Proactive Planning

6 TAX PLANNING STEPS





ROI Meeting

Review of Tax Plan for xxxxxxxxx



High Level Tax Plan

Complete a deeper dive in Tax Step 2 and present a high level tax plan for client to review.

To create a tax proposal, our team:

- Reviews personal 1040 tax returns
- Analyzes tax liability using TPIQ
- Reviewed impact of dozens of different potential tax strategies

Design Plan to Maximize ROI



Tax Risk Mindset 1-5

**1. Very
Conservative**

**2. Moderately
Conservative**

3. Average Risk

**4. Moderately
Aggressive**

**5. Very
Aggressive**

- Simple and Safe.
Long-standing rule
- Audit = basic
paperwork

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- Very complex strategies, requires the 8886 Disclosure to IRS
- Audit = elevated compliance burden and IRS scrutiny

What You Keep

| | |
|-----------------------|------------------|
| Tax Plan Savings 2025 | \$142,000 |
| Tax Free Income | \$0 |
| Total Amount | \$142,000 |
| Plan Investment | \$21,300 |
| What you keep | \$120,700 |
| 10 Year Savings | \$759,520 |

Year 1 Opportunities



Return On Investment

Your investment – Year 1

Estimated Year 1 Tax Savings: \$xxx,000

Your investment in VFO Services:

One-Time Fee: \$xxxxx
50% Planning & Education: \$xxxxx
50% Implementation: \$xxxxx

Your investment in VFO Specialists:

Year 1 Plan Investment: \$xxxxx

Net Year 1 Tax Savings

Potential

\$xxxxxx

IMMEDIATE ROI

xxx%

Year 2 Opportunities



Return On Investment

Your investment – Year 2

Estimated Year 2 Tax Savings: \$xxx,000

Your investment in VFO Services:

Ongoing Fee: \$0

Your investment in VFO Specialists:

Year 2 Plan Investment: \$xxx000

Net Year 2 Tax Savings

Potential

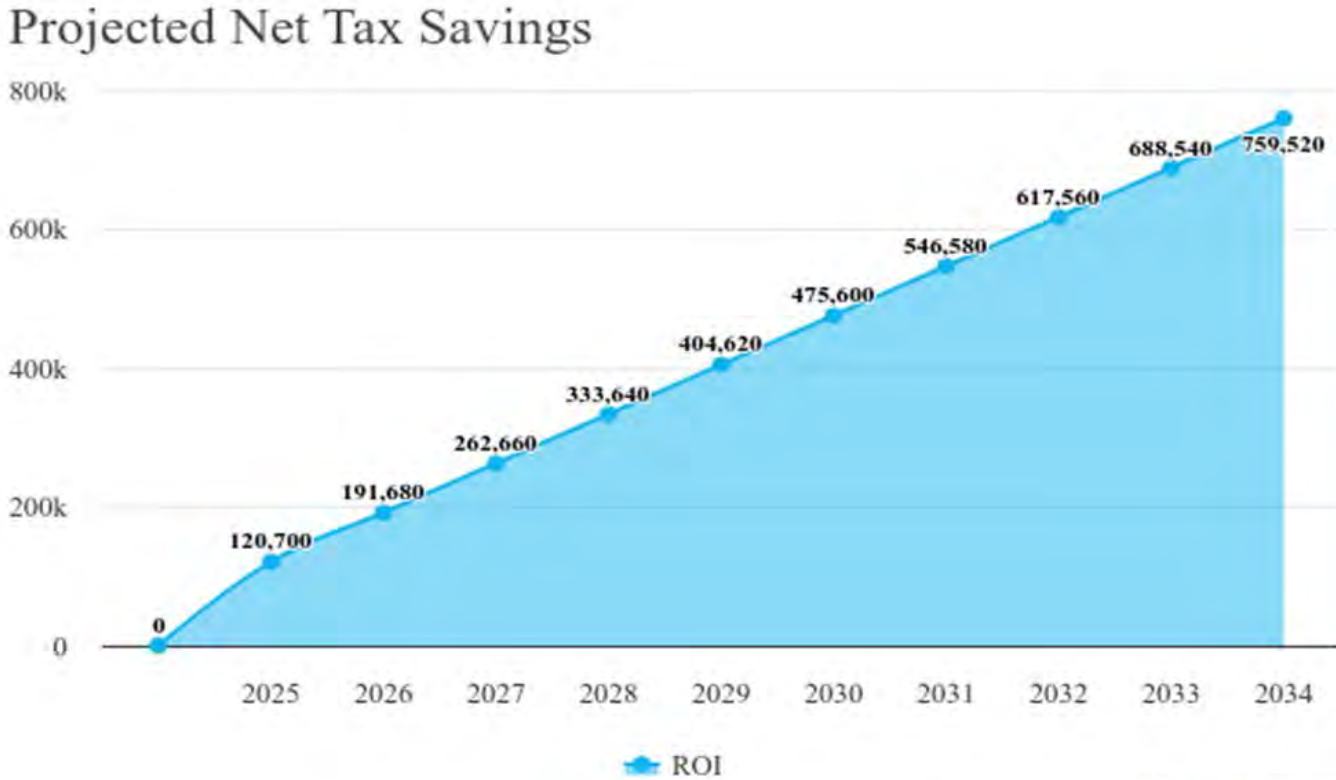
\$xxx,000

IMMEDIATE ROI

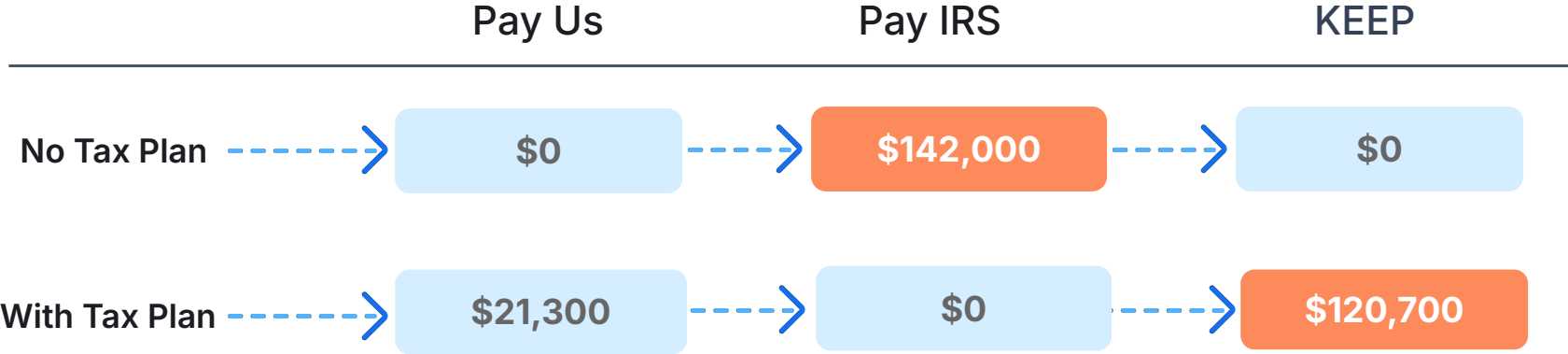
xxx%

Return On Investment Over 10 Years

Projected Net Tax Savings



Choose Who You Pay:



Congratulations - Next Steps



-Choice-

50% Retainer:
\$10,000
(refundable)



-Choice-

50% Retainer
non-refundable



-Choice-

50%
Implementation Fee:
\$10,000



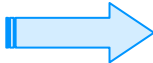
STEP 3: Engagement Letter

Sign Engagement Letter to confirm scope of services. Initial Invoice sent after signing.



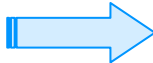
STEP 4: Detailed Tax Plan Review

Meeting with Tim Gacsy to outline details of each specific strategy identified.



STEP 5: Education

Meeting with VFO Specialists to finalize the optimal tax planning strategy. Finalize technical details and figures.



STEP 6: Implementation

Execute the agreed upon tax planning techniques with VFO Specialists.



Detailed Tax Plan Review

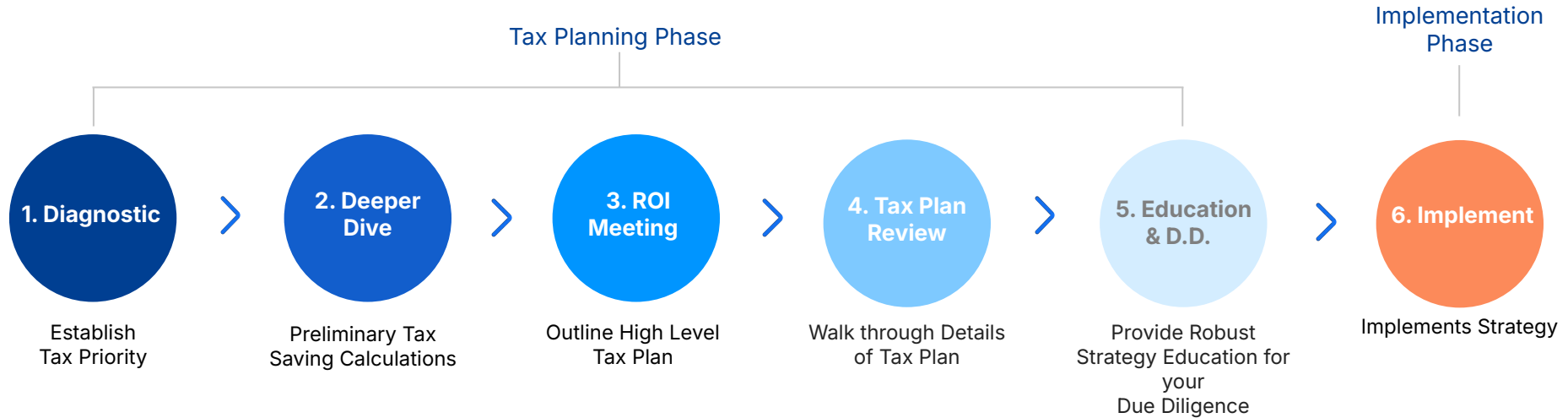
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Disclaimer

These materials are provided for planning discussion purposes. They illustrate potential tax strategies based on general assumptions and should not be relied upon as final tax, legal, accounting, or investment advice. Any implementation decisions should be made in consultation with your qualified professional advisor(s). Use of these materials does not create a CPA-client, attorney-client, or other professional relationship with VFO Services or its affiliates.

TAX Proactive Planning

6 TAX PLANNING STEPS





Tax Step 4 – High Level Tax Plan

Since you last met - we have completed our deeper dive in Tax Step 2 and we are now ready to present the detailed tax plan for your review.

To create this tax proposal, our team has:

- Reviewed personal 1040 tax returns
- Analyzed tax liability using tax planning software simulation
- Reviewed impact of dozens of different potential tax strategies

Tax Risk Mindset 1-5

1. Very Conservative

- Simple and Safe. Long-standing rule
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Tax Risk Mindset 1-5



Last Meeting you graded yourself as a **2 = "Moderately Conservative"**

We have prepared our preliminary workings on this basis

Tax Planning Details

VFO SPECIALIST ONBOARDING GUIDE

1. Initial Vetting & Credential Verification
2. Compliance & Risk Management
 - Require third-party documentation evidencing strategy legitimacy:
 - Private Letter Ruling (PLR) from the IRS, or
 - Formal Tax Opinion Letter (TOL), or
 - Independent legal due-diligence report (e.g., Mick Law).
3. Technology & Data-Security Alignment
4. Process & SOP Alignment
5. Capacity & Scalability
6. Economics & Engagement Terms
7. Client Experience & Educational Resources
8. Formal Approval & Integration

Reminder of Initial Numbers

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Potential Tax Savings Strategies

We have identified **4 TAX SAVING STRATEGIES**

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Tax Risk Mindset 1 - *“very conservative strategy”*

- Renting of Personal Property to Business
- Family Employment
- Advanced Combo Plan

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Tax Risk Mindset 1 - *“very conservative strategy”*

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Tax Risk Mindset 2 - *“moderately conservative strategy”*

- Tax Credit Investment

Potential Tax Savings Strategies

We have identified **4 TAX SAVING STRATEGIES**

We will now consider each strategy - highlighting:

- **Benefits & Considerations**
- **Cost of Implementation**
- **Potential Tax Savings**
- **Potential ROI (Tax Savings / Cost of Implementation)**

Potential Tax Savings Strategies

We have identified **4 TAX SAVING STRATEGIES**

We will now consider each strategy - highlighting:

- **Benefits & Considerations**
- **Cost of Implementation**
- **Potential Tax Savings**
- **Potential ROI** (Tax Savings / Cost of Implementation)

Starting from **Least Risk** - and **Building to a Cumulative Layered Tax Proposal**

Strategy 1 - Augusta Rule

WHAT IS IT?

Valuation-driven rental arrangement between you and your company to convert some ordinary operating costs into deductible payments.

BENEFITS

- Creates annual tax-free income.
- Deduction to business.
- Straightforward compliance.

CONSIDERATIONS

Must substantiate rental value and proper documentation.

Tax Free Income

~\$15,000-20,000

Tax Savings

~\$5,000-6,000

ROI

100%

Strategy 2 - Family Employment

WHAT IS IT?

Redirect part of your profits into your family's future through bona fide employment.

BENEFITS

- Shifts income to lower tax brackets.
- Create opportunities for family members.

CONSIDERATIONS

Payroll and employment compliance needed.

Income Shift

~\$48,000

Tax Savings

~\$15,000-18,000

ROI

30-40%

Strategy 3 - Advanced Combo Plan

WHAT IS IT?

IRS-approved retirement framework that converts profits into deductible contributions at scale.

BENEFITS

- Large annual deductions which accelerates retirement savings in tax-deferred vehicles.

CONSIDERATIONS

- Requires consistent cash flow.
- Ongoing administrative and actuarial costs.

Tax Savings

~\$45,000-65,000

ROI

30-40%

Strategy 4 - Tax Credit Investment

WHAT IS IT?

Leverage clean-energy incentives to lower current taxes and accelerate deductions—potentially unlocking prior-year refunds.

BENEFITS

- Immediate high ROI via credits and accelerated depreciation.
- Potential refunds by carrying credits back 3 years.

CONSIDERATIONS

Requires upfront capital

Total Value

~\$55,000-85,000

(Refunds + 2025 savings)

ROI

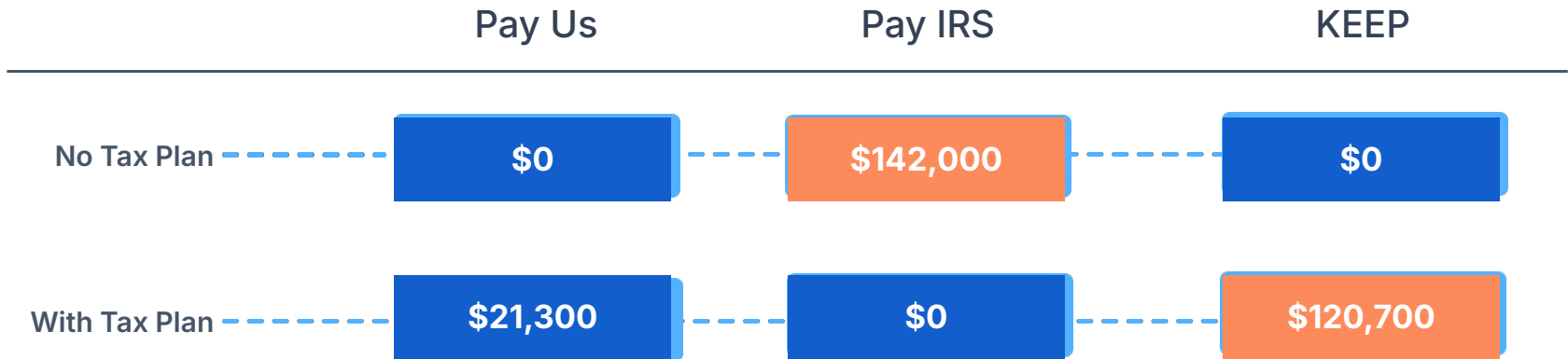
90-120%

(Year 1), with refund potential
from carryback

What You Keep

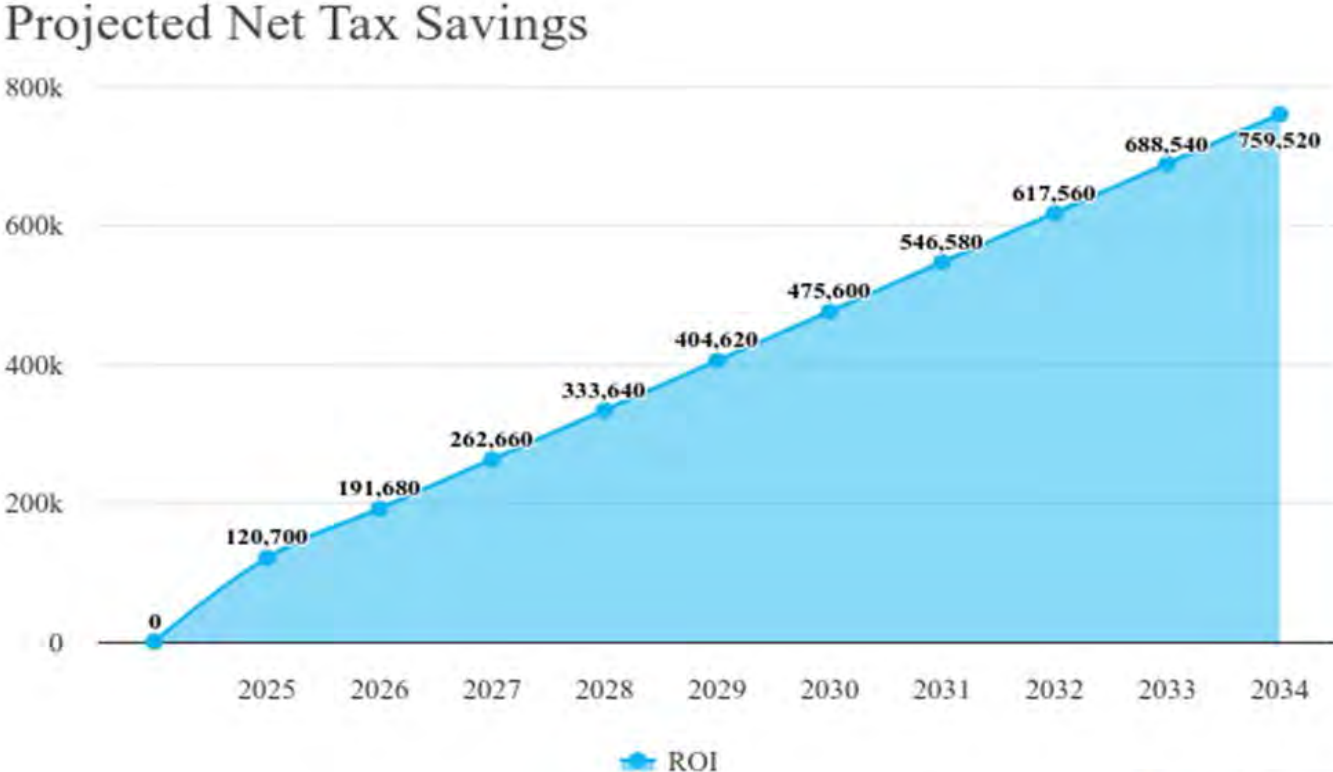
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Choose Who You Pay:

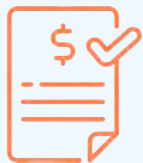


Return On Investment Over 10 Years

Projected Net Tax Savings

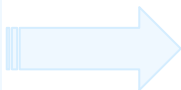


Congratulations - Next Steps



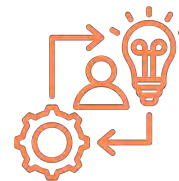
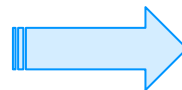
Engagement Letter & Initial Invoice

Sign Engagement Letter to confirm scope of services. Initial 50% of tax plan fee due upon signing.*



Detailed Tax Plan Review & Education

Meetings with specialists to finalize the optimal tax planning strategy. Remaining 50% of tax plan fee due prior to implementing any strategy.



Implementation

Execute the agreed upon tax planning techniques with VFO Specialists.

*Satisfaction Guarantee

If you are not satisfied with the detailed plan and do not want to move forward after today's meeting, we'll refund the initial tax plan fee.

Our “Guarantee”

If you move forward with implementation but the savings are lower than projected,
we'll make it right!

VFO Tax Planning Process: Now Available for All Members!

We created a way for members to leverage the VFO Tax Planning Process, supported by our tax planning team.

Key Details to be Aware of:

- Tax Planning Fee is typically 1/3 to Advisor, 2/3 to VFO Services & Tax Planning team (would adjust if tax planning is joint)
- VFO Specialist Revenue is same as listed in VFO Community
- 100% of AUM & insurance goes to member (based on licensing)
- **Minimum client qualification** in most situations is \$100k of federal income tax paid / due, or sale of \$1m+ asset

How to Get Started

Complete the **VFO Fast Track training** prior to submitting first Tax Plan.

Once Completed, follow the below steps:

1. Visit the **VFO Tax Planning** landing page
2. Complete 5-min **Tax Planning Diagnostic**
3. Submit **\$500 Tax Planning Refundable Deposit**

We'll work with members on a first come, first serve basis and communicate with you every step of the way!

Scan to complete the
VFO Tax Planning Interest Form:



Someone from our team will be in touch!

