

FREE 5-Point Tax Review

Each year as tax season comes to a close, we typically field a few calls from dentists who are friends, but not current clients of Edge. We discuss several topics regarding their office and current accounting firm. Maybe you have had similar thoughts and/or questions? We would like you to know that we are here to help.

Here are some of the questions?

- Is my current accountant doing enough to help me and are they saving me money?
- Is my current accountant charging me too much money for the services being provided?
- Are my office and accounting systems up-to-date and running efficiently?
- Does my accountant know enough about the dental field?
- Does my accountant know enough about Wisconsin taxes (out-of-state accountant)?
- My accountant doesn't have a CPA designation; does he/she have the appropriate credentials?
- Is it common to have my taxes extended?
- Is it common to get repeat letters sent from the IRS?
- My CPA retired, and I don't enjoy working with the new CPA that was assigned to me. Is it difficult to switch to a new company?

The team of Dental CPA's at Edge are truly committed to Wisconsin and its excellent dentists. If we can help you, your office, and/or your family, we want to do so. In fact, we would like to offer you and your office a FREE, no obligation 5-Point Review of your taxes. We are proud of our team and their accomplishments and feel we could provide value to you and your office.

Here are some facts about our team:

- We are dental specialized
- Our fees are fair and in many cases, lower than our competitors
- We have taught at Marquette University School of Dentistry on the topics of Accounting, Practice Metrics, and Dental Operations
- We lecture at Marquette, Minnesota, Iowa, and Midwestern dental schools
- We lecture to several local WDA component society events
- Our CPA's are Institute of Dental CPA members
- Our CPA's are National Society of Certified Healthcare Business Consultants members
- Edge is a 2 time winner of the MMAC-COSBE Future 50 Award
- Our CPA's are limited to the number of clients they take on, so you will never get passed down to a Junior Accountant (like some of the big firms do)
- We are small business owners like many of you and deal with the same HR, marketing, and operations issues like most of you do. What we are saying is that we understand in greater depths than most CPA's what it is like to run a business.

FREE 5-Point Tax Review

If you would like move ahead with the FREE 5-Point Review, please fill out and return this document.

We look forward to helping you!

Sincerely,

Andy Lehmkuhl, Partner Marshall Watry, CPA Tom Whalen, CPA Mike Ball, CPA Adam Hughes, CPA
AJ Rheinschmidt, CPA Adam Pritzl, CPA Jack Marx, CPA Jake Schnese, CPA Scott Holmquist, CPA

Mutual Non-Disclosure Agreement

This agreement is made effective on _____ by and between Edge Advisors, LLC (first party) and (second party) (collectively, the "Parties"), to ensure the protection and preservation of the confidential and/or proprietary nature of information disclosed or made available or to be disclosed or made available to each other.

The Parties Agree as Follows: All information disclosed to the other party shall be deemed to be "Proprietary Information." The term "Proprietary Information" shall not be deemed to include information that (i) is now, or hereafter becomes, through no act or failure to act on the part of the receiving party, generally known or available information, (ii) is known by the receiving party prior to the effective date or, (iii) is disclosed pursuant to a requirement or request of a government agency, subpoena or other legal proceeding.

Each party shall maintain in trust and confidence and not disclose to any third party or use for any unauthorized purpose any Proprietary Information received from the other party, except as otherwise required to by law. The responsibilities of the Parties are limited to using their efforts to protect the Proprietary Information received with the same degree of care used to protect their own Proprietary Information from unauthorized use or disclosure. All Proprietary Information shall remain the property of the disclosing party and shall be returned to the disclosing party after the receiving party's need for it has expired, or upon request of the disclosing party, and in any event, upon completion or termination of this Agreement. This Agreement shall be governed by the laws of the state of Wisconsin. This Agreement contains final, complete, and exclusive agreement of the Parties relative to the subject matter hereof and supersedes any prior agreement of the Parties, whether oral or written. The term of this agreement is effective indefinitely, commencing on the "Effective Date."

Edge Advisors

Second Party (Signature)

Second Party (Print Name)

Information Needed for a FREE 5-Point Tax Review:

- Past (2) Years Completed Business Tax Returns
- Depreciation Schedule (if not listed in Tax Returns)
- Past (12) Month Production By ADA Code
- Current Accounting Services Provided (Payroll, Consulting, Filing Taxes, etc.)
- Staff Compilation (Position, Salary, Benefits, Bonuses, Yearly Hours, etc.)
- Past (2) Years Profit and Loss Statements
- Production by Staff Member (Dentist and Hygiene)
- Current Tax Software