



# YOUR PATH TO EASY CLIENT RETENTION

*featuring* David Mozeika



September 2023  
For Broker Dealer / RIA /  
Financial Professional use only.

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# ON NEXT MONTH'S POWER SESSION LIVE

*Mark Hanna, President of MDRT*



**MDRT**<sup>®</sup>



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# BACK OFFICE TAX SERVICES NOW OFFERED

- Back office tax service for financial professionals
- Letter of recommendation from a CPA + option for additional consulting
- Tax planning, not just tax preparation



[RWTax.net/back-office](https://RWTax.net/back-office)



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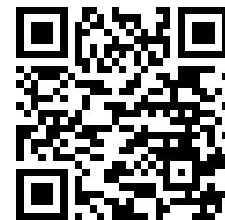
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# LET US DO YOUR BOOKKEEPING



[RWTax.net/accounting-pricing/](http://RWTax.net/accounting-pricing/)

## Basic

- Bookkeeping for less than 100 transactions per month
- Bank reconciliation
- Monthly financial statements (P&L, balance sheet, cashflow, 1099s)

\$150/mo

## Standard

- Bookkeeping for 100-300 transactions per month
- Bank reconciliation
- Monthly financial statements (P&L, balance sheet, cashflow, 1099s)

\$250/mo

## Premium

- Bookkeeping for 301 or more transactions per month
- Bank reconciliation
- Monthly financial statements (P&L, balance sheet, cashflow, 1099s)

\*\$350/mo+

\*Pricing for this tier starts at \$350/mo for 301-500 transactions. Every additional 200 transactions adds \$100/mo



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# TAX

# CONSULTATION

Take advantage of tax incentives  
and stay organized with help from  
our head CPA, Rhonda!



[Calendly.com/rw-tax-client-consults](https://calendly.com/rw-tax-client-consults)



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# LEARN MORE ABOUT

# REAL WEALTH



[Calendly.com/real-wealth-advisor-success-team/learn-real-wealth](https://calendly.com/real-wealth-advisor-success-team/learn-real-wealth)

## Thomas Clark

“Have been in the business longer than John and his talking points are the most complete and effective I have ever seen. **These alone are worth a fortune!”**

## Jose Rodriguez Jr

“I really enjoyed today’s presentation. Thank you all, *Real Wealth®* is the best.”

## Roger Relfe

“I have 3 businesses who need to work on next generation succession now!!”

## Laurie McNamara

“Today’s speaker really spoke to Me! I am already forming my Top 3 for this year!”



Testimonials herein may not be representative of the experience of other customers, do not guarantee of future performance or success, and no participants have been compensated for their testimonial.



# WANT FAIRWAY RESOURCES?

Fill out our survey to connect with  
Fairway and learn about home equity's  
role in retirement income planning!

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# currency



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# QUESTION & ANSWER

Type in your questions now!

Don't forget to register  
for these *every month!*

**Second Friday @ 10:30 am CST**



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