

**CONSULTATION POLICY**

**Phone or Zoom**

1. **PLEASE READ THIS DOCUMENT CAREFULLY POINT-BY- POINT**
2. **QUICK QUESTION:**
* Your **QUESTION** may seem **BRIEF.**
* **NO SUCH THING.**
1. **FAVORABLE CONDITIONS FOR YOU AND ME:**
	1. In a **QUIET** place, away from barking dogs, crying babies,

screaming kids, and clattering dishes.

* 1. **AWAY** from **DISTRACTIONS**
1. **MATERIAL READY IN FRONT OF YOU:**
2. **Your Tax Return**
3. **Documentation for your appointment**
4. **Paper & Pencil**
5. **PREPARE NUMBERED AGENDA (See agenda sheet attached):**

a) If we do not receive your agenda within 48 hours of your appointment,

 we will cancel your appointment.

 b) **This step is mandatory, required, and non-negotiable**

1. **PREPARE:**

Through years of experience, I have found that my clients benefit by **preparing carefully** in advance for any consultation.

1. **THINK:**

 Before a consultation, either via Zoom or telephone.

 a client should give careful thought and consideration to:

 **a)** What they want to accomplish.

 **b)** The issues to be discussed.

 **c)** Specific questions to be addressed in the order you wish to discuss them.

1. **SEND:**

 Please provide all documentation 48 hours in advance.

 Make sure that we both have the same agenda in front of us.

 This ensures that we are “on the same page.”

1. **CLIENT BENEFIT:**

 Our meeting will be more focused and productive for you.

1. **ADDITIONAL CLIENT BENEFIT:**

**If your consultation is so smooth and efficient, and we need less than the full hour,**

**YOU WILL SAVE MONEY.**

1. **FEE:**

 The fee for the consultation, either via Zoom or telephone,

 is **$300** per hour, billed in 1/4 hour increments.

 I accept checks, VISA, MasterCard, or Discover.

 **We do not accept American Express!**

1. **MONEY**:

**$300 divided billed in ¼-hour increments (i.e.)**

* + **¼ hour $75.00**
	+ **½ hour $150.00**
	+ **¾ hour $225.00**
	+ **1 hour $300.00**
1. **CANCELLATION POLICY:**

If you cannot keep your scheduled appointment

for **ANY** reason, you must cancel **prior to 48 hours** before your appointment,

or **you are responsible** and subject to a cancellation fee of $300.

Cancellations can be made **via email only** at CPA@NYTaxStrategies.com.

This appointment time is reserved specifically for you,

and it excludes all other potential clients.

1. **YOUR RESPONSIBILITY:**

 Number your items 1), 2), 3), 4), 5), etc.in the order of discussion.

1. **WHY CAN’T I CALL IN MY QUESTIONS?**
2. You **LOSE CONTROL** of your agenda.
3. You are not taking time to prepare for your consultation.
4. **ADDITIONAL QUESTIONS:**

Additional questions asked after the scheduled appointment will require a second appointment.

**Thank you in advance for your understanding and cooperation.**

**Client Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Agenda for Consultation with Robert Greene CPA CMA**

**Date of Consultation**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Contact Tel. Number:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*\*\*Please note that any follow-up questions asked after the scheduled appointment will require a second appointment.\*\*\*

1. **First Item:**
2. **Second Item:**
3. **Third Item:**
4. **Fourth Item:**

**… and my other question is**

1. **Fifth Item:**