



*Testimonials*

**SEE WHY CPAS WORK WITH US**

**We Make Your Business BETTER**



## Expand Your Market Share and Better Position Your Business for the Future.

America's Tax Solutions™ works with CPAs across the nation to help add financial planning services to their existing practices to enhance what they offer to their clients. Our unique approach creates opportunities to expand your business with proven tools and best practices to help ensure your future success.

### See What Our CPA Clients Have to Say:

*"I have a growing tax practice in Palos Hills, IL that I started late in life after leaving the TPA retirement industry where I had been in charge of administering several high profile accounts. When my associate and I started our tax business, we'd often find 401(k) or IRA statements mingled among our clients' documents. We'd look at each other, laugh, and say, "Why are they giving us this stuff?" As you know 401(k) contributions appear on W-2s anyway, and any particular IRA statement, on its own, does not confirm total contributions made.*

*Then we attend one of Barry Bulakites' seminars for CPAs and he opened our eyes to the potential problems and risks we are getting ourselves into by not paying more attention to these statements. He also awakened us to the prospect of additional earnings by adding a financial management aspect to our practice and showing these clients how they can diversify these retirement funds into more conservative investments.*

*In previous years, I tried several ways to generate income outside of tax season. I became a realtor and mortgage originator. I tried to sell my clients pre-paid legal services. None of these additional services offered nearly the synergies as getting my insurance license and adding financial management to my practice. Advisors try hard to understand their clients' financial situation. However, nothing can compare to the CPA's historical knowledge and insight into the family's financial dynamics. This allows them, working as a team, to meet that client's financial needs more quickly and successfully.*

*Over the past two years, I have attended as many of Barry's seminars as possible. He has flown out to my area several times to speak to my clients about issues related to beneficiary designation and all those who attended ended up gratified over the opportunity to learn things they hadn't heard elsewhere. The advisors he introduced me to have also been professional and well received and have generated sizable commissions in which I have shared. In short, Barry has been a windfall to my practice both intellectually and financially. He is a wealth of knowledge, and I can confidently recommend all of his various Table Bay programs to financial advisors and CPAs alike."*

**Gerald K., Illinois**



*"It is an absolute fact that the tax business is going south, and it will continue to go south in the upcoming years. Take our firm for example. In two short years, we went from having 700 clients to having only 600 clients. It wasn't that long ago that we had 1,200 clients! Unfortunately, clients pass away, they start using tax software or they just simply no longer have the level of income to need their taxes done.*

*The average small accounting practice gets 70% of their revenue from doing taxes—that business is declining at about 15% every year. That means, at the current rate, within five short years, one's business could dwindle away completely. We needed a solution to keep the clients we had without having to raise prices. We also wanted to grow our client base without emptying our pockets on marketing.*

*That's why my wife and I decided to add wealth management consulting to our practice and join America's Tax Solutions. The ATS program lets us:*

- *Help our clients preserve and protect their legacy from unnecessary taxation*
- *Increase and accelerate our revenue*
- *Protect our firm from possible litigation*

*We were impressed by the knowledge we received and the materials given. The easy to follow hands on training programs America's Tax Solutions offers allows us to properly educate our clients and protect them in ways we couldn't before.*

*The grand finale was when Barry Bulakites helped us conduct our first client workshop. We thought it was an educational experience for our clients. The presentation was so impactful, that when clients came into our office for their follow up appointments and beneficiary review, they were already pre-sold! One client even told us it was an "eye opener" for them.*

*We've been a member of America's Tax Solutions for two months now, and have already made an extra \$85,150. We recommend this program to any CPA who wishes to provide a value-added service to his clients, increase their revenue and bulletproof their practice from potential litigation.*

*This system is truly turn-key. Barry and his team do what they say they'll do. In our opinion, this is the real deal. Thank you, Barry!"*

**Cliff & Terrie S., California**



*"It is extremely hard to do be both a CPA and an advisor, but it can be done successfully with the right training and know how that I received from Table Bay."*

**Larry L., California**

*"I learned about the liability that could exist for many of my clients if they don't have their IRAs done correctly. Every CPA, attorney and investment professional should attend this training."*

**Mick A., California**

*"Never has there been such a great opportunity to not only help people save themselves from needless mistakes and loss of capital in their retirement planning, but to also help protect those liable for any of these mistakes."*

**Ed L., California**

*"I attended a Table Bay IRA Summit and was instantly mesmerized. Barry knew what he was talking about. He was the most knowledgeable person on the subject of IRAs and distribution planning. After that first meeting, the words 'Help Your Clients Eliminate and Mitigate Heavy, Immediate and Unnecessary Taxation' were forever etched in my mind."*

**Larry L., California**

*"Attending this school was eye-opening. I didn't realize the extraordinary opportunities I would have been missing out on with respect to my business and protecting the financial future of my own clients."*

**Jim W., California**

*"I cancelled my morning meetings to attend the Best Practices Tour and it was well worth it."*

**Brian L., California**



*“With over 15 years as an accountant, I had no idea how much I didn’t know about these important topics discussed at the Best Practices Tour.”*

**Henry R., California**

*“I started bulletproofing my practice immediately after the Best Practices Tour meeting.”*

**Lee S., Nevada**

*“I’ve reduced client defections significantly since attending the Best Practices Tour!”*

**Will P., Michigan**

*“Today’s smart accountant needs to be special; they must offer ideas and solutions that their competition has no knowledge of or cannot be commoditized by the internet.”*

**Larry L., California**

*“Wow! This was the best presentation on IRA distribution changes and strategies I have ever attended.”*

**Matthew B., Michigan**

*“I received invaluable information at the Best Practices Tour!”*

**Nathan B., California**

*“The Best Practices Tour was the best meeting I have attended in the past 10 years.”*

**Steve H., California**

*“The Best Practices Tour was dynamic and totally enjoyable.”*

**Dan S., California**



*“Everyone is saying they offer the best presentation and solutions for the accounting community. America’s Tax Solutions actually delivers the best presentation hands down compared to what I have seen.”*

**Mary S., Michigan**

*“The support you get from America’s Tax Solutions is what differentiates the firm from other financial firms. They specialize in helping accountants integrate financial planning into their tax practices and their specialists help implement plans that address possible tax implications.”*

**John F., California**

*“America’s Tax Solutions continues to challenge me to learn more and keep current with the industry so I can provide services that benefit my clients. Adding financial services to my tax practice is the best thing I could have done for my clients and myself.”*

**Mason G., Michigan**

*“My Wealth Management Consultant (WMC) is always helpful in getting what I need for a client on a timely basis to close the deal. Making use of my WMC is like having someone on staff.”*

**Tom R., Florida**

*“The culture at America’s Tax Solutions is a family atmosphere that fosters the entrepreneurial spirit in the accounting profession. It’s like being part of an extended family where everyone is working toward the betterment of my practice.”*

**Lisa L., Nevada**

*“Thank you for coming out and sharing your knowledge and expertise with us. I appreciate your commitment to supporting/training me so that I can become a more valuable advisor to my clients. I believe the Table Bay/America’s Tax Solutions model is the right way to get CPAs like me moving into the right direction to help our clients. I know the real work starts today getting the clients in the office and running the program.”*

**Fred M., New Mexico**



*"Hi Barry, Thank you very much for visiting us. This is a definite GO for us due to the trust we have in you and your team. I will be in touch shortly to deliver the contract and discuss next steps.*

*Keep up the good work y'all--very impressive organization and we are excited to work with you!"*

**Andy F., California**

*"The seminar yesterday was exactly what I needed to get a handle on this concept. I finally figured out how to forward your monthly newsletter directly to my database of contacts and within 24 hours I received an email from a previous client who had prepared his own tax return for the past two years.*

*Here is what he wrote:*

*"I remember going to a seminar you co-sponsored with a lady who is an expert in investments/ retirement and was wondering if you still have an association with her or another highly rated professional in that line that I could meet with to plan our retirement. I'm 68 and it's time to face reality.*

*Second involves taxes for the current year. I have been muddling along with Turbo-Tax for two years to try my hand at it, but this year is going to include some heavy medical expenses due to medical expenses, so I no longer feel comfortable handling this on TurboTax.*

*Hope you are well and prospering in all you put your hand to. Thank you in advance!"*

*Bottom line, the newsletter caused an old client to return and provided us an opportunity otherwise irretrievably lost. THANKS AGAIN FOR DOING WHAT YOU DO!"*

**Jerry K., Illinois**

*"I have attended as many of Table Bay's seminars as possible. Barry has flown out to my area several times to speak to my clients about issues related to beneficiary designation and all those who attended ended up gratified over the opportunity to learn things they hadn't heard elsewhere. I have since generated sizable commissions and, in short, Barry has been a windfall to my practice both intellectually and financially. He is a wealth of knowledge, and I can confidently recommend all Table Bay programs to financial advisors and CPAs alike."*

**Gerald K., Illinois**



*“Thank you so much for hosting the CPA Academy. I learned so much that will benefit my clients and enhance my practice. Juanita and I have a long “to-do” list for summer projects, we are very excited to implement what we learned.”*

**Tracy S., Virginia**



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