

GPS QUESTIONNAIRE

Name _____ Phone _____

Street Address _____ E-mail _____

City and State _____ Zip Code _____

PROFESSIONAL PROFILE

Designation(s) [please check all that apply]:

CPA ____ PA ____ CFP ____ EA ____ MBA ____ CVA ____ CA ____ ATTORNEY ____

Presently in practice: Yes ____ No ____ If Yes, annualized billings: _____

Do you have an office: Yes ____ No ____ Square footage: _____

If not in practice, present occupation: _____ Annual salary _____

Personal net worth _____ Net worth of business _____

PRACTICE ACQUISITION CRITERIA

Range of annual billings sought, from _____ to _____

Geographical area(s) considered for acquisition (Please provide zip codes, cities, or states of interest): _____

Type of practice desired (check all that apply): Audit ____ Accounting & Tax ____ Tax Only ____
Accounting, Tax & Financial Planning ____ Virtual ____ Other, please specify _____

Timeframe for purchase: ASAP ____ 1-3 months ____ 3-6 months ____ 1 year + ____

Available cash for down payment: _____

Have you ever filed for bankruptcy: Yes ____ No ____

Comments: _____

Thank you for providing the above information. We will contact you shortly.

Sincerely,
New Clients, Inc.

GUARANTEED PRACTICE SEARCH (GPS)

Initial investment: \$2,500.

Your initial investment includes:

- Targeted mailer to firms within a 15-mile radius of your office from our database and from purchased lists.
- Targeted email to firms in our database.
- Targeted email to NCI clients' firms in our database in your target market.
- Personal calls made to NCI clients whom we think may be a fit for your profile.

Following are just a few recent examples of successful GPS clients. 1) NCI located two practices for a GPS client in Texas. 2) A client from Georgia secured a \$1.8 mm firm through GPS that is under an LOI. 3) In New York, we located two firms for a buyer; one is under an LOI and the other is still in negotiation. 4) In Boston, we located a \$1.2mm firm for a client two years ago that sold for \$1.4 mm three months later!

Your \$2,500 fee is non-refundable; however, if we do not locate a practice for you to purchase in your market within 90 days, NCI will provide you with access to our Online Sales and Marketing Academy, which has helped over 4000 accountants build large and successful accounting firms. The standard price for the Online Sales and Marketing Academy is \$1,995, which provides additional value for your initial fee while NCI continues your GPS. When NCI locates a practice and obtains the practice listing, NCI will apply your \$2,500 fee towards the purchase price of the firm, if you enter into a purchase agreement.

If you are in agreement with these terms and conditions, please sign and date this page below and fax both pages of this document to (856) 478-0345 or email both pages to marge@newclientsinc.com. When received and approved, we will initiate your Guaranteed Practice Search.

I prefer to pay by ____ Check or ____ Credit Card. If using a credit card, please provide and return the following information:

____ Discover ____ MasterCard ____ Visa

We no longer accept American Express for payment.

Credit Card # _____ Expiration _____ CVV Code _____

Billing Address _____

Signature: _____

Print Name: _____ Date: _____

Sincerely,
New Clients, Inc.