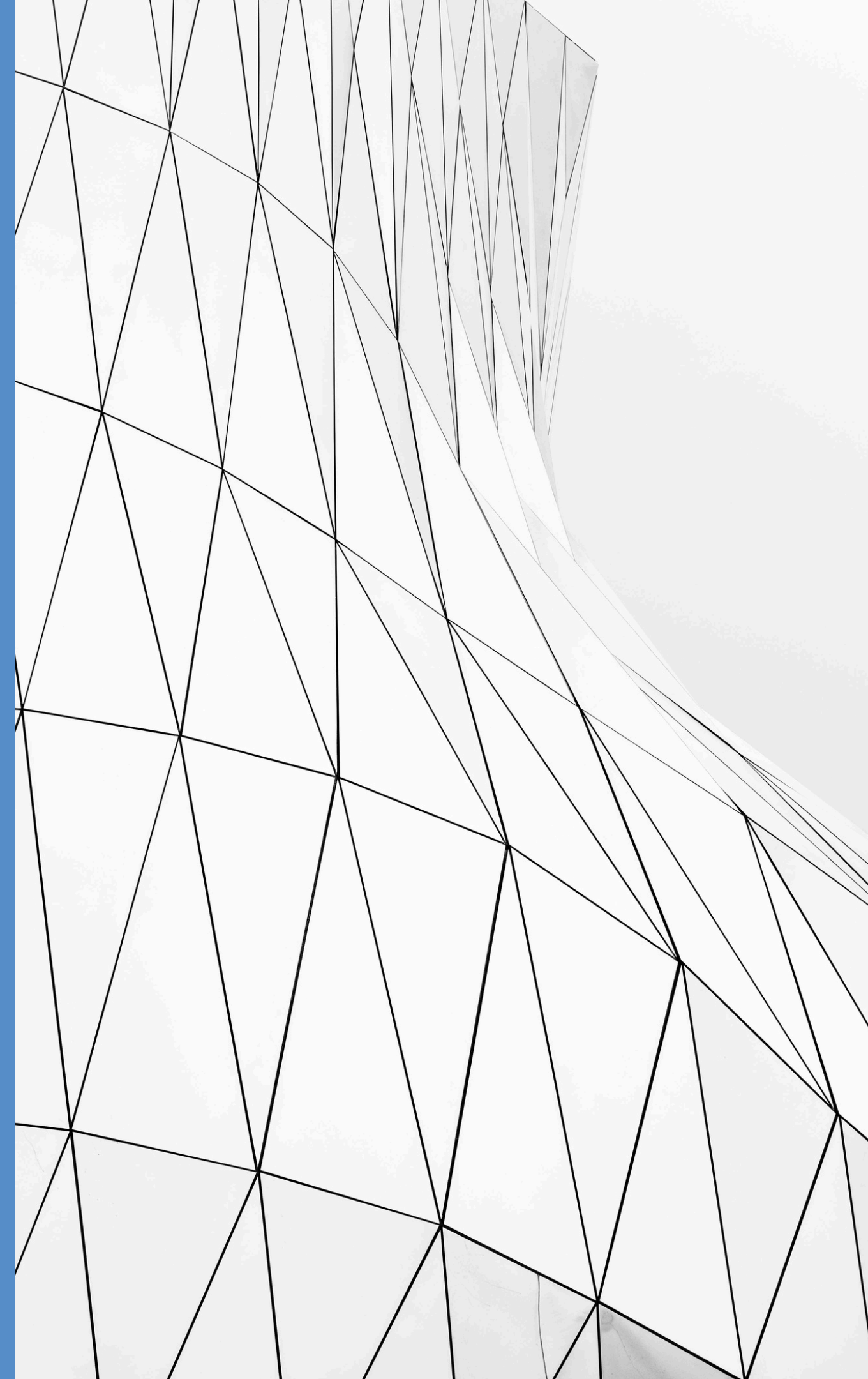




Stop Leaking Revenue with SAM Technology.

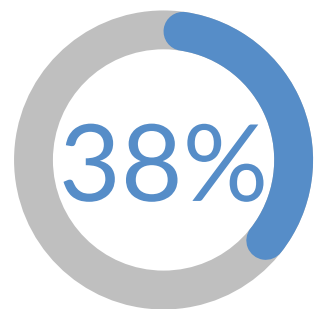
A solution for accountants, built by accountants.

Prepared For:

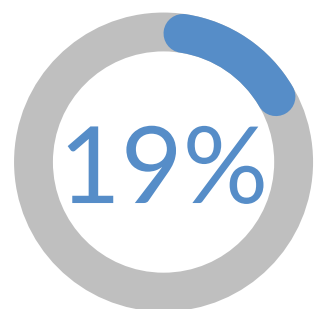


Why Over 400 Firms Choose SAM

- Increase Revenue
- Reduce Overhead
- On-Demand Network of over 700 Licensed Accountants
- Advanced Tax and Business Advisory Services
 - Such As Tribal Tax Credits
 - Automated Tax Planning with AI
 - Expert Tax Research at a Fraction of the Cost
- Compliant with IRS and AICPA
- Eliminate A/R and WIP with SAM's Payment Gateway
- Bank-Grade TLS 1.3 Infrastructure with 256-bit Encryption



Average Reduction
in Annual Overhead
in First Year.



Average Increased
Revenue of Firm in
First Year



Licensed CPAs and EAs

900+



Firms Joined in Last 12 Mo.

277



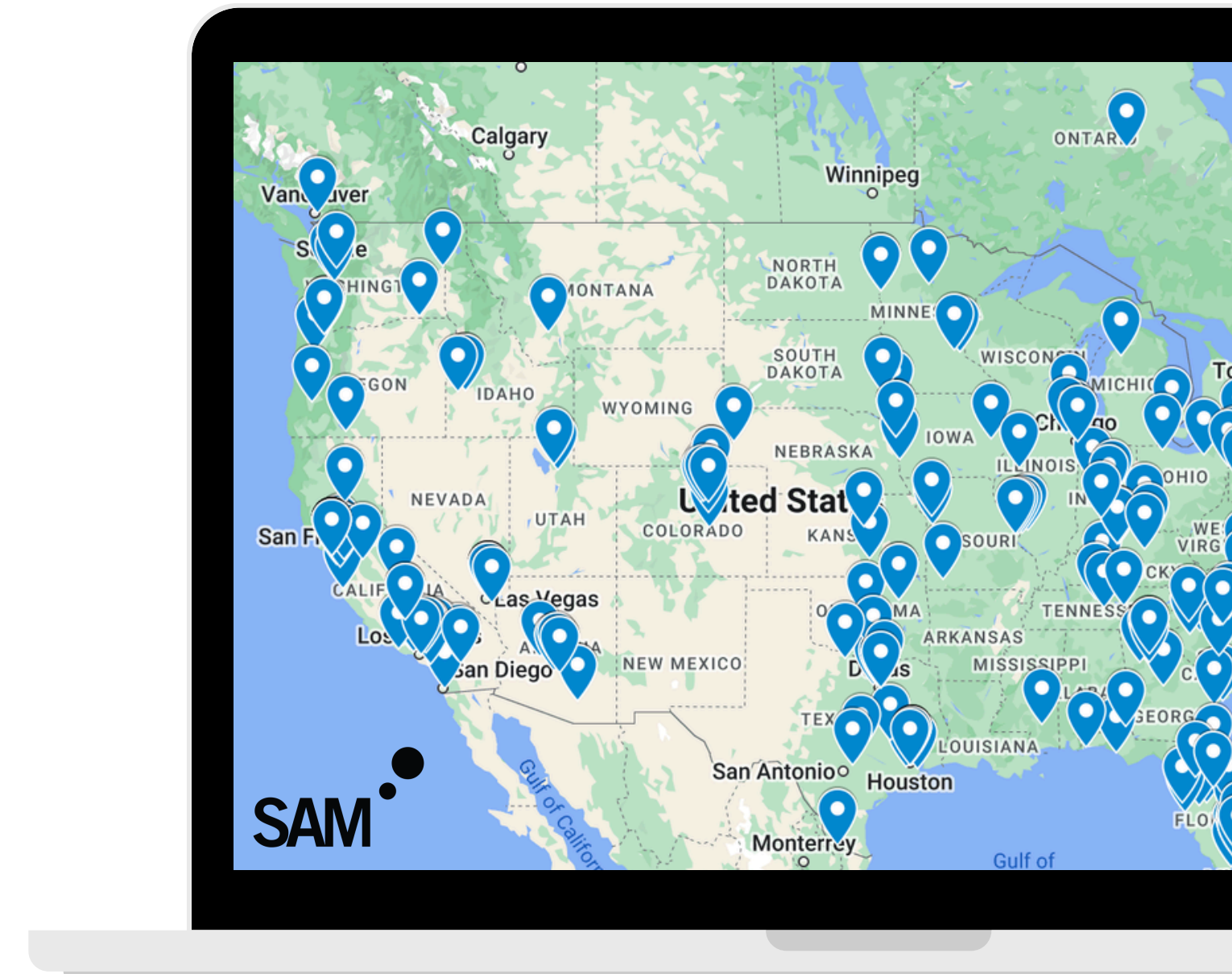
Tax Returns Processed

12,000+



Current Annual Tax Return Capacity

150,000+



Meet SAM

- A technology-driven solution tailored for CPAs and EAs, built by CPAs.
- Powered by a network of 700+ U.S. licensed CPAs and EAs.
- Trusted by firms nationwide.

Our Solutions:

01 Tax Preparation Outsourcing

Solve HR headaches and reduce overhead, especially seasonally. More affordable than in-house and traditional outsourcing.

02 Tax Planning and Business Advisory

SAM's AI engine automatically generates tax plans and business advisory upsells for your clients including advanced tax savings vehicles like the Tribal Tax Credit.

03 White Label Integration

Create a branded client experience with SAM's software at no extra charge. Reduce WIP, A/R, collect payment and manage documents, all with your firm's branding.

04 AI Ticket Mining

SAM's proprietary technology scans submitted source documents and tax returns to identify upsell potential and displays them via an easy to operate dashboard. This allows you to focus on higher profit advisory activities.

05 Free Scalable Software

SAM's proprietary tools, like Ticket Mining and White Label, unlock hidden revenue opportunities and automate workflows, allowing firms to grow without adding thousands in software costs.

06 Membership Programs

Bespoke membership programs allow your firm access to special features and incentives that help your firm get ahead of the competition...with no fee.



Proudly Serving:

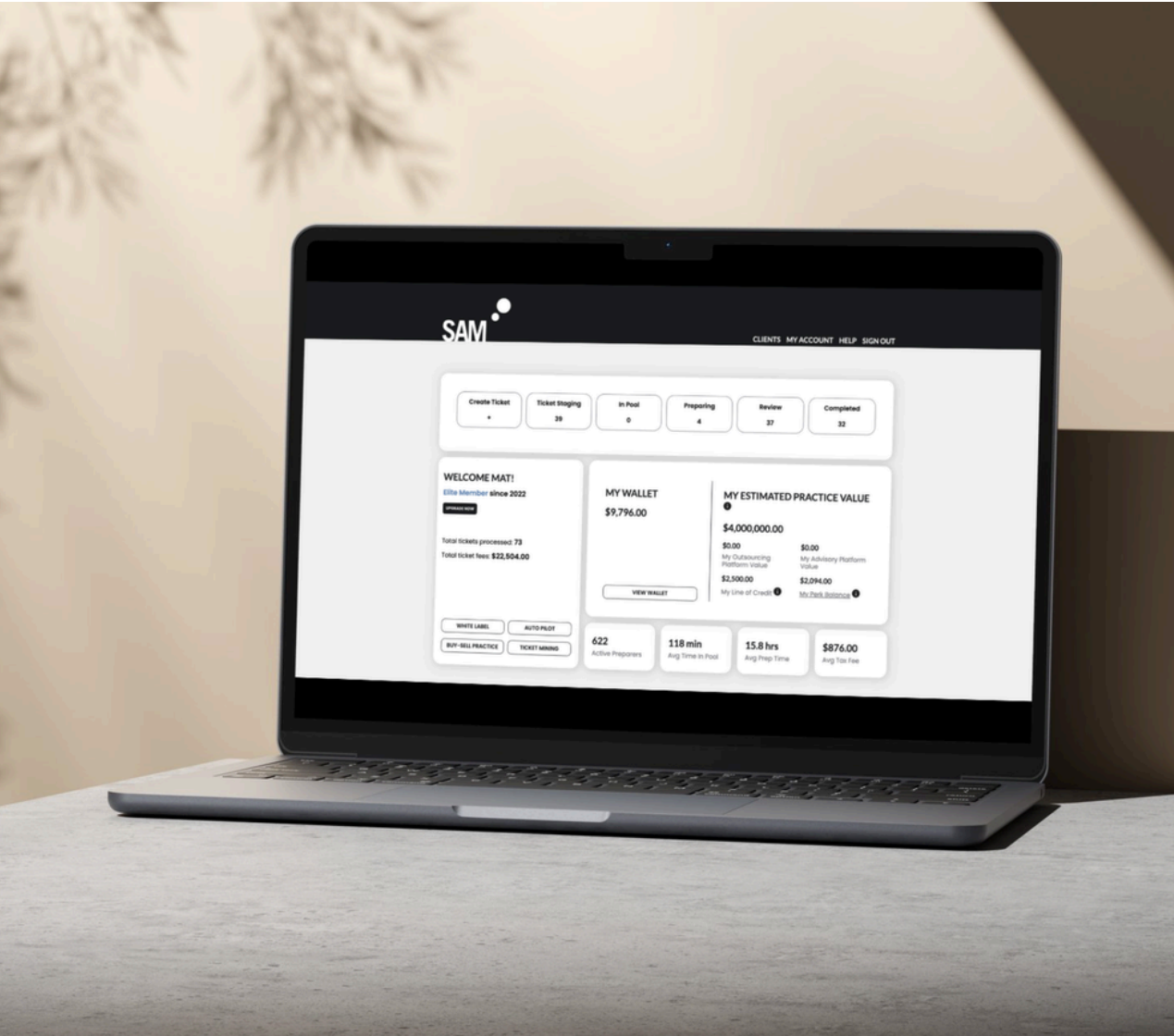


How It Works

We created a suite of accounting solutions that work with firms of all sizes.

Why?

Because there is nothing else like it.



Step 1



Sign Up

Onboard your firm and set your preferences. We'll walk you through this and get your firm integrated with SAM in no time. **There is no upfront cost to start.**

Step 2



Send Work

Create tickets and upload documents securely through our White Label platform or manually. Our fee is on the first page and **what you see, is what you'll pay.**

Step 3



SAM Delivers

Any and all of your tax returns, tax research, tax planning, and other advisory can be handled by SAM's established network of U.S. professionals. Tax returns are **prepared AND reviewed within 72 hours.**

Step 4



Grow

SAM's platform, AI engine, and preparer network grow with your firm allowing you to scale easily. You also have the opportunity to **focus on higher grossing activities** while we handle your compliance work.

Real Success Stories



Using SAM has been the greatest decision I have made. The quality of the work done is impeccable and the experience and knowledge of the preparers exceeds my expectations. They have been better support than my prior tax department employees.



CARMEN M PETERS
YOUR CONCIERGE TAX STRATEGIST

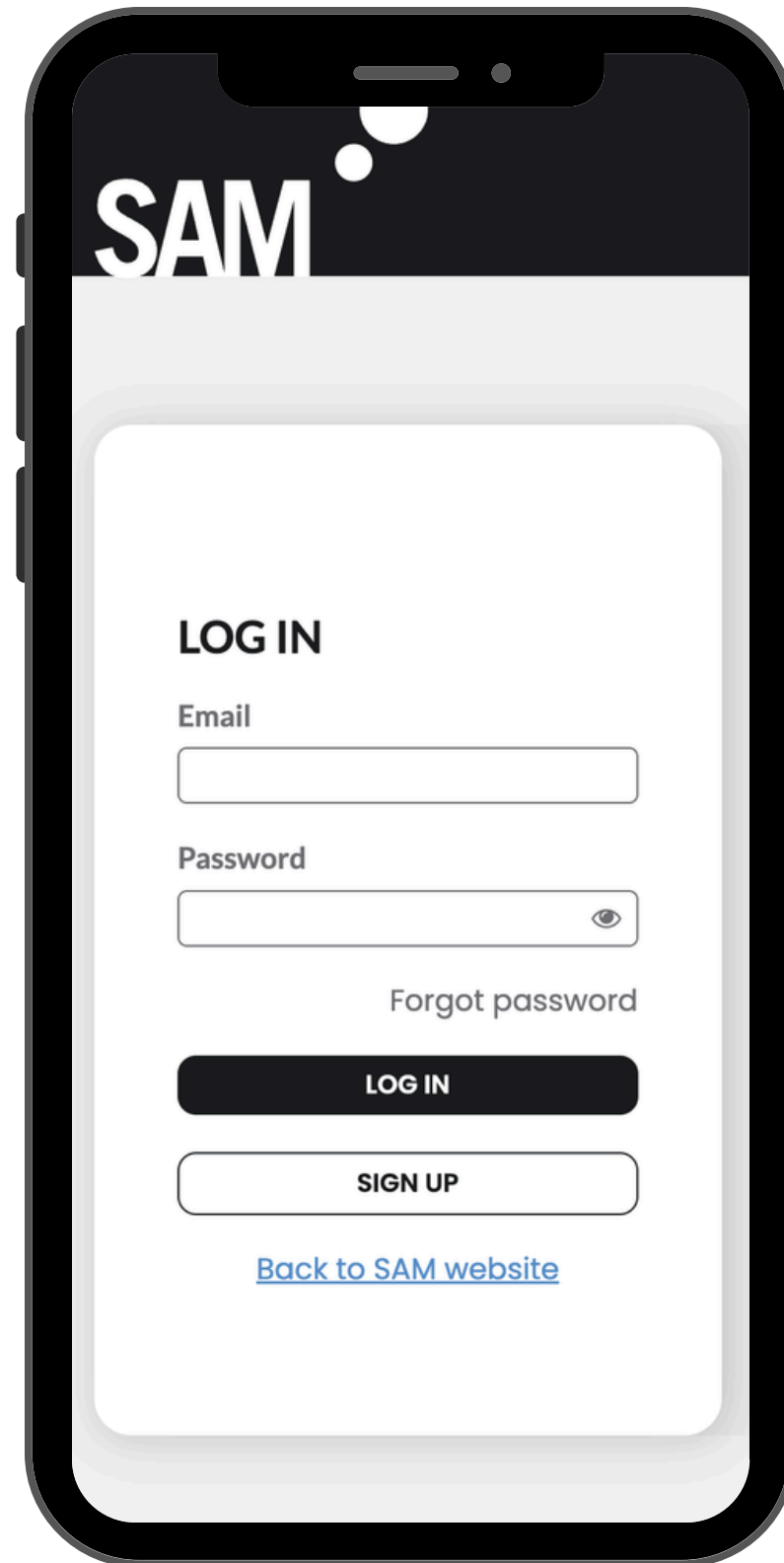


SAM was a lifesaver for us this tax season. We were able to increase our volume by outsourcing our tax prep to SAM and not sacrifice our quality of life. I found them super responsive to our concerns and questions as well as finding ways to work around to suit our needs.

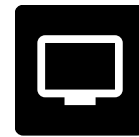


I started using SAM late February this year and they were extremely helpful in setting me up when I feel like I didn't have time to change procedures. It was really easy to learn and implement. I wish I had known about SAM earlier in the year!





Let's Talk About Next Steps



Schedule A Technical Demo

Let us craft a tailored experience to show you how SAM can integrate into your firm to start improving efficiency, open additional revenue channels, and reduce your firm's revenue leakage.

Thank You

We look forward to serving your firm.

 Telephone

855-726-1065

 Website

www.mysamcloud.com

SAM

CLIENTS MY ACCOUNT HELP SIGN OUT

My Wallet \$9,796

SAM