

# SAM TECHNOLOGY, INC

A FUTURE OF PROFITABILITY FOR YOUR FIRM



SECURE



SIMPLE



U.S. BASED



FUTUREPROOF

YOUR ACCOUNT EXECUTIVE:  
MATTHEW LINK



# PRESENTATION OUTLINE

THE  
CHANGING  
INDUSTRY



COMMON  
ISSUES



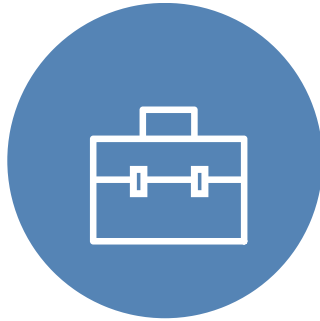
BENEFITS OF  
CLOUD PREP



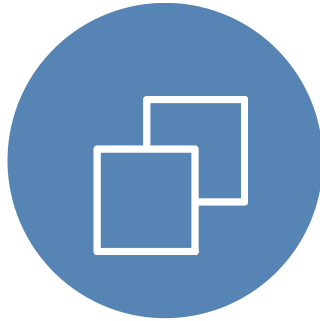
SAM GROWS  
WITH YOUR  
FIRM



MORE  
OPPORTUNITIES



HOW EASY IS  
SAM?



MANAGEMENT  
TEAM



WHY SAM?

# THE INDUSTRY

The industry today is changing at a rapid pace.  
Is your firm prepared for it?

Impacting changes that firms are experiencing are:

- Economy
- Seasonality of Work
- Fee Pressures
- Compete to Survive/Thrive
- Increased Regulations
- The Great Resignation







# PROBLEM OR OPPORTUNITY?

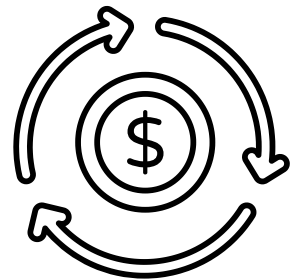
There are several common issues affecting all firms. SAM offers a solution to prevent lost revenue from:

- Training costs
- Human Resource costs/benefits
- Short period for Value Added Service
- Less face to face time with clients
- Increased security costs

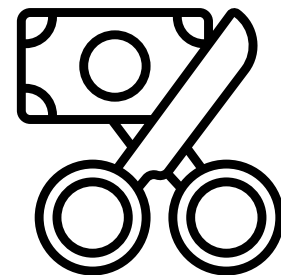
SAM Technology offers a solution that solves all of these AND allows your firm to offer additional Value Added Services all through one easy to use platform.



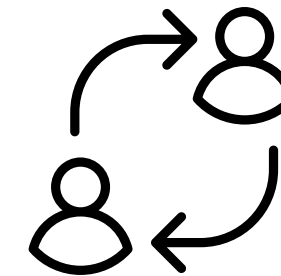
# BENEFITS OF CLOUD PREP



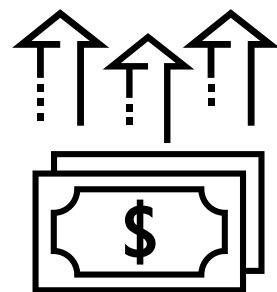
Easy to adjust to **YOUR**  
business cycle



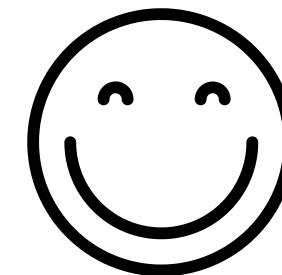
Cut overhead costs by  
paying **ONLY** for work  
done.



Prevent turnover of key  
staff, especially during  
crunch time.



Increase your firm's valuation  
through healthier EBITDA.



Earn more, without  
working more!





## **SAM GROWS WITH YOUR FIRM INTO THE FUTURE**

All of our systems are based on artificial and business intelligence, supported by professional workers, and cybersecurity support from some of the best in their field over the last 20+ years.

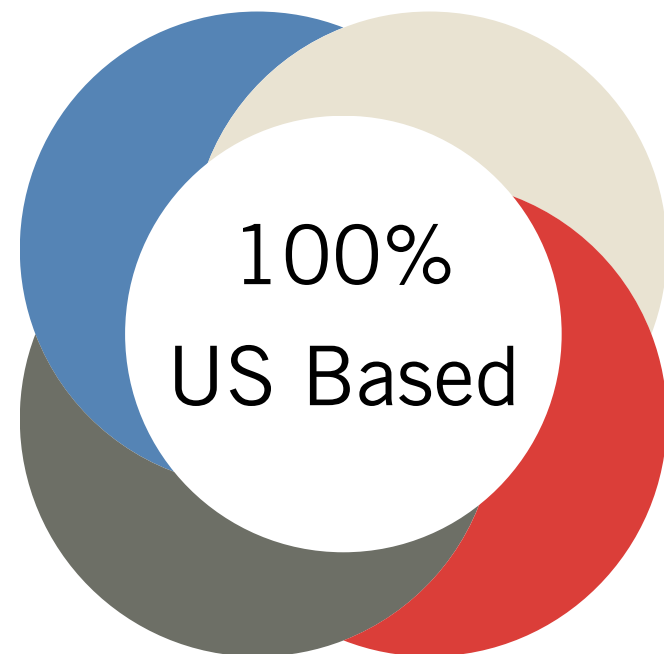
Therefore, your firm has an entire team ensuring that all of the best products, features, and security are available to you, so that you may offer them to your clients.

**This is how SAM is changing the  
way Tax Professionals do  
business forever...**



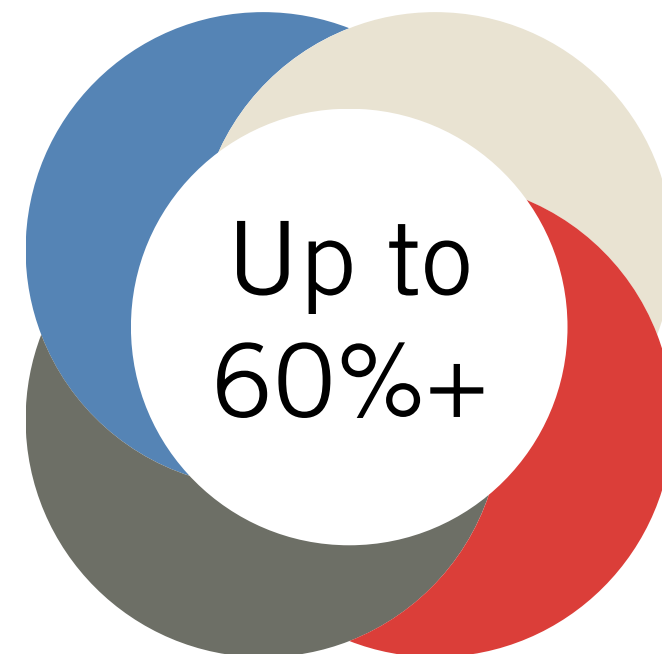
# MORE OPPORTUNITIES

SAM



All preparers are  
CPA/EA's

And are 100% US Based  
to ensure accuracy and  
security. All preparers  
are verified for Identity,  
Residency, and  
Licensure.



More Revenue  
from Less  
Overhead

Average Salary for a  
Preparer is \$52,000  
not including  
benefits and FICA.  
Increase profitability  
by cutting overhead



Even MORE  
Revenue from  
Additional  
Services

- **Tax Planning**
- **Bookkeeping**
- **Payroll**
- **Audited Financial Statements**
- **Private Equity**
- **And More!**



# MORE OPPORTUNITIES (CONT.)

There are so many great reasons to work with SAM, it's hard to pick the top three, but here are a few more reasons why SAM is a great partner for your firm.



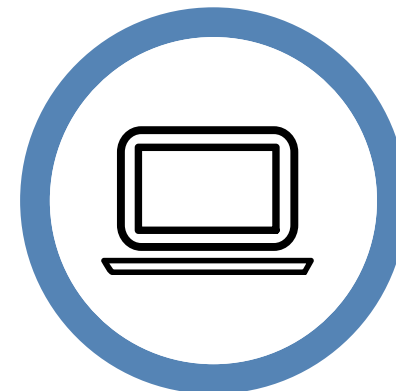
## No Minimum!

1 return or 1,000,000. The choice is yours to try it before you dive in completely.



## No Upfront Fees!

We're so sure that you're going to love the easy-to-use platform and the increased profitability, that we only collect your money when you submit a return(Ticket).



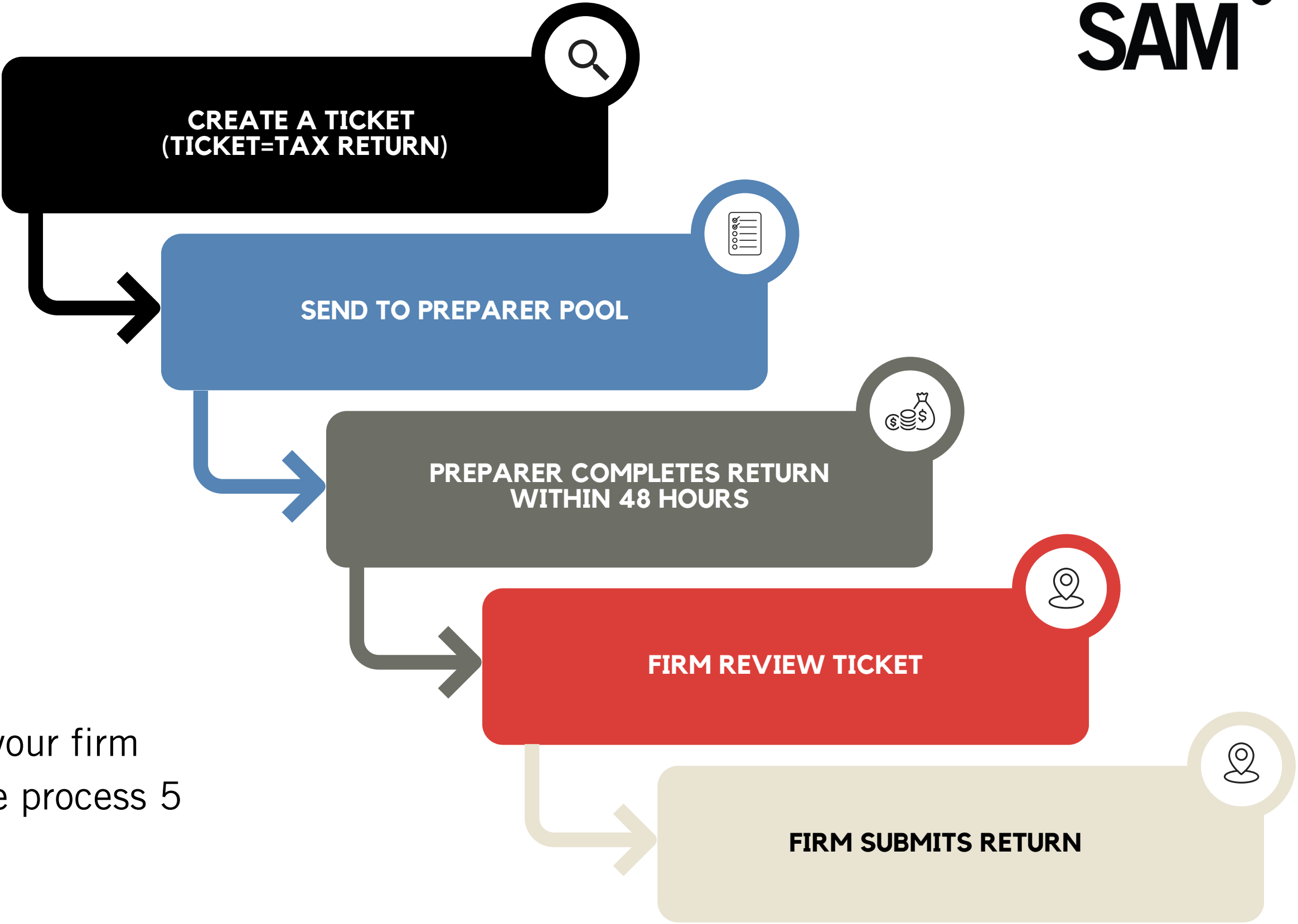
## No Contracts!

There's no commitment required, unless you want to make even more money. Then we have memberships...



# IT'S REALLY THIS EASY...

The SAM Team works hard, so your firm doesn't have to. We've made the process 5 simple steps.



Repeat!



**HOW SECURE IS  
THE SAM  
MARKETPLACE?**

# MANAGEMENT TEAM

We have experts who are professionals in their fields, and all of them put forth great effort to provide the best service for you and your firm.



**Mark Kubinski**  
CEO

40+ Years in Tax  
Accounting with H&R  
Block and Deloitte.



**Gregg Davis**  
CIO

25+ Years in  
Cybersecurity and  
affiliation with WSJ and  
Stanford.



**Todd Steinberg**  
Executive V.P. Sales

25+ Years of experience  
in accounting services  
spanning over 4000+  
firms.



**Matthew Link**  
Sales Director

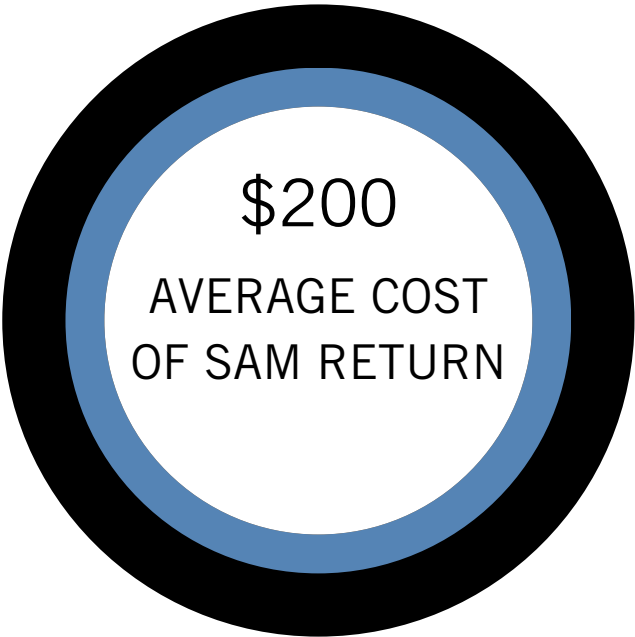
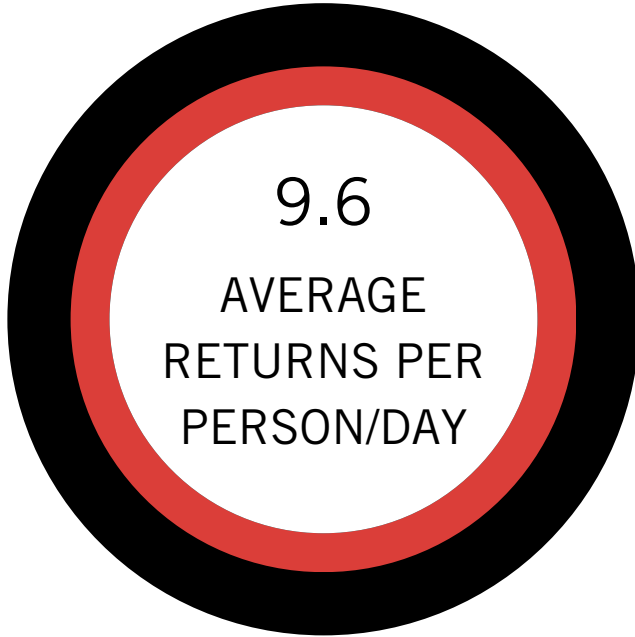
5+ years in High Profile  
Client Success.



# WHY SAM?

Here are some numbers to show the value of SAM Technology for your firm...

Sources:







# SAM TECHNOLOGY

MATTHEW LINK

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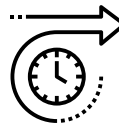
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