

Lindsey's Insider Circle Enrollment Form

I want to be a part of *Lindsey's Insider Circle*:

GOLD MEMBERSHIP

- Lindsey's "Lock It In Tight Guarantee". I guarantee your Gold Level membership investment will not exceed your current tax preparation and advising fees.
- Federal and state income tax return prepared and e-filed including your world-class bound reference copy and your CD archive. (average \$350 value)
- Special "Member Only" open call in consultation times. (\$825 value)
- Unlimited e-mail advisory consultations. (\$825 value)
- Priority Front-of-the-Line service. (\$59 value)
- Complimentary preparation of dependent's tax returns. (\$250 value)

That's \$1,959 in additional value WITHOUT any increase in costs. Your annual membership will automatically continue unless cancelled. Your annual membership rate could go up or down depending on changes in the complexity of your returns and Lindsey & Waldo's standard rates and fees. Should you decide to cancel your membership, you can do so at anytime by calling Lindsey's Insider Circle at 251-633-4070 or faxing a cancellation note to 251-633-4071. No hassles, guaranteed!

It's impossible for you to lose. You have my personal "No Hassle, Double Guarantee." (1) Your membership investment is guaranteed not to exceed your current tax preparation and advisory fees and (2) should you decide to cancel your membership – No hassles, guaranteed!

A Gold Membership might be the best place to start your journey with Richard Lindsey. Your taxes are confusing or complicated and you want the assurance gained by membership in Lindsey's Insider Circle. At a certain point, you will want to take your game even further, and consider a Diamond Membership.

DIAMOND MEMBERSHIP

As a Diamond Member, you'll get all of the Gold Membership benefits including your next year's federal and state income tax returns prepared and e-filed, your world-class bound reference copy and CD archive, unlimited e-mail questions, priority front-of-the-line service, complimentary dependent's return and extended time to speak personally with Richard Lindsey. But you'll also get sleep like a log peace of mind, knowing your Lindsey & Waldo tax specialist – and Richard Lindsey – is on your side when dealing with any "routine" income tax notice or inquiry from the Internal Revenue Service or state taxing authority. (They're anything but routine, aren't they?)

Plus you'll also get 4 hours of Richard's expertise to use as you'd like. Call on Richard to help get a new business started, for tax planning, or to stand up for you on one of those nasty IRS audits. The 4 hours are banked immediately. You can use them all at once or spread out over the course of the year.

Your Diamond Membership benefits are valued at \$1,443 over and above your Gold Member benefits.

Diamond Membership investment is a low \$20 per month, in addition to your Gold Membership.



I request enrollment in *Lindsey's Insider Circle* at the _____ GOLD level _____ DIAMOND level

Name _____ Client ID _____

Your monthly charge will be: \$ _____ or \$ _____ one-pay

Monthly Payment Options:

____ Electronic Debit Withdraw on: 1st 10th 20th

Bank Name: _____

Checking Account / Savings Account Personal Account / Business Account

Routing #: _____ Account #: _____

____ Credit/Debit Card Charge Charge on: 1st 10th 20th

Credit Card #: _____ Exp Date: _____ CVV Code _____

Name as it appears on card: _____

Card billing address: _____

City: _____ State: _____ Zip Code: _____

Authorization Signature: _____ Date _____