



MSO IMPLEMENTATION TIMING & PROCESS



TRA Report

- Turn around is 4-6 weeks
- Jake Valente is the client's main point of contact during the process *Jake@guardiantaxconsultants.com*
- Client's advisor will be CC'd on all communication
- Guardian will schedule a meeting to go over the TRA Report with the advisor and their client once completed



MSO Implementation

- Turn around time 4-6 weeks
- These steps must be done prior to calendar year end:
 - MSO entity open
 - MSO bank account open
 - Bank account funded by Management Fee
 - Management agreements executed
- Corporation documents will be required in order to open the MSO's bank account
- Owners may lend their operating companies the cash required
- Guardian's implementation fee covers all required legal documents for this strategy



Strategy Execution

- Guidance on set up, including payroll, adopting existing insurance, fringe benefits, etc.
- Addressing Risk Gaps identified in TRA Report
- Ongoing consulting for Year 1

