

# Accelerate the growth of your Advisory Firm

For Strategic Partners



**GUARDIAN**  
TAX CONSULTANTS

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Guardian Tax Consultants

# The Big Question

- How will you identify, approach and engage high value prospects in 2025?

# 3 Steps to Building High Value Clients

1. Differentiate sales and marketing conversations
2. Identify a Problem Match and assess for suitability (MSO)
3. Use the MSO to create **cashflow** (that did not exist before) to help grow and protect the shareholders business and personal estates (with life insurance)



# What is an MSO?

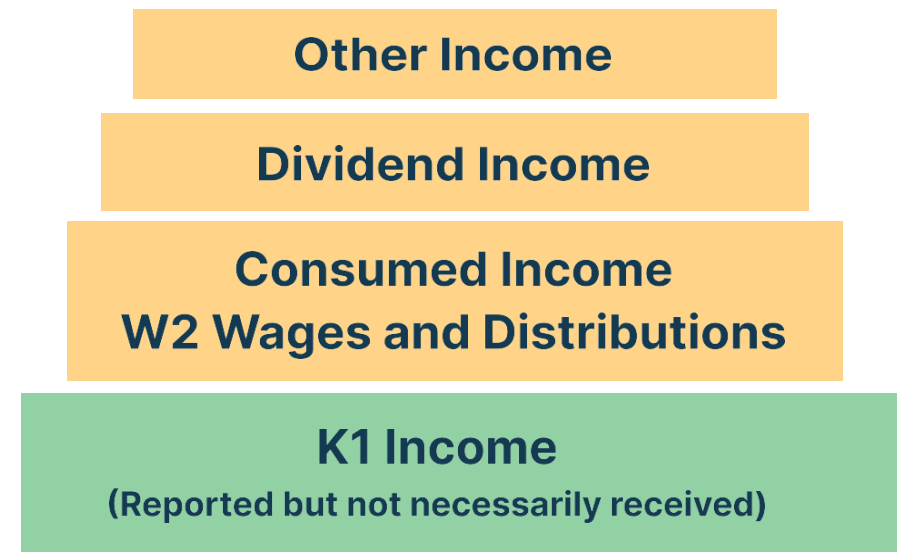
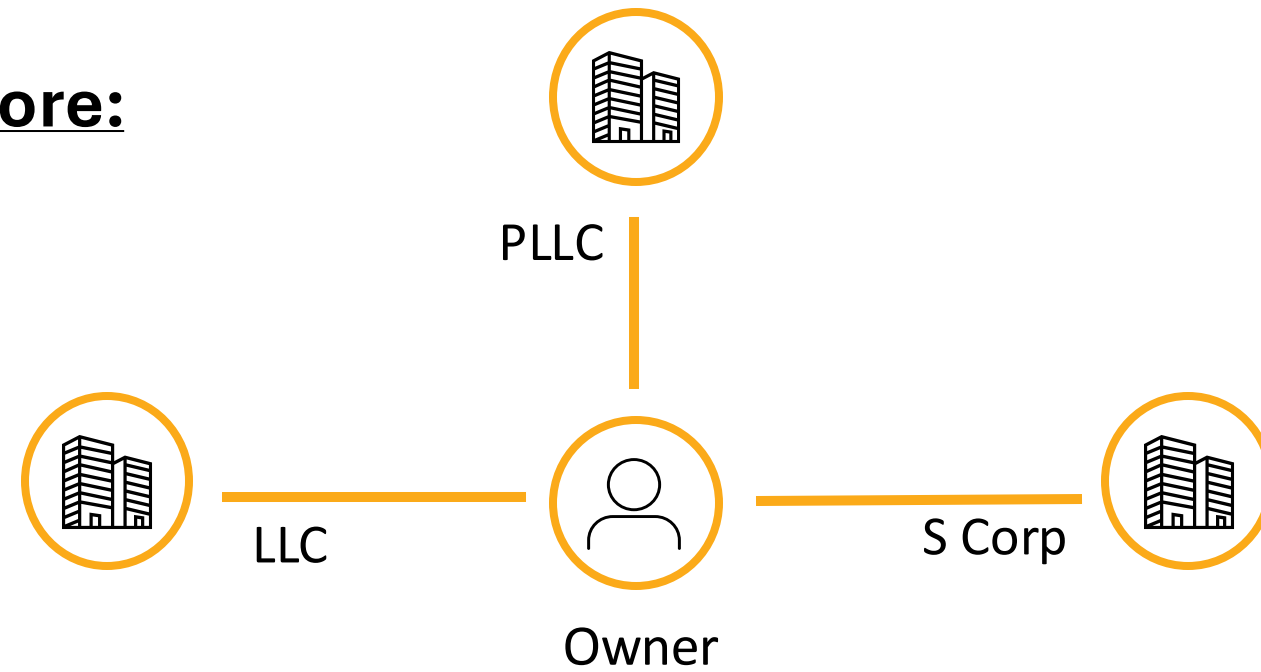
- A new entity taxed as a C-Corporation
- Provides services/value to the existing operating entities
- Services are paid via a management fee (Cash Flow)
- Management fee is deductible to the operating companies

# Who does the MSO work for?

- Problem Match (Target Client)
  - Private business owner
  - \$2 - \$15 M in profit
  - Frustrated with quarterly taxes
  - Need for business and estate planning

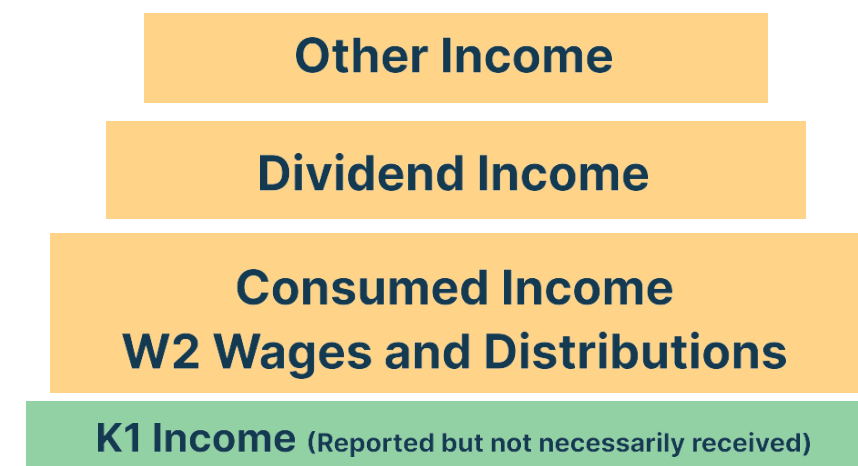
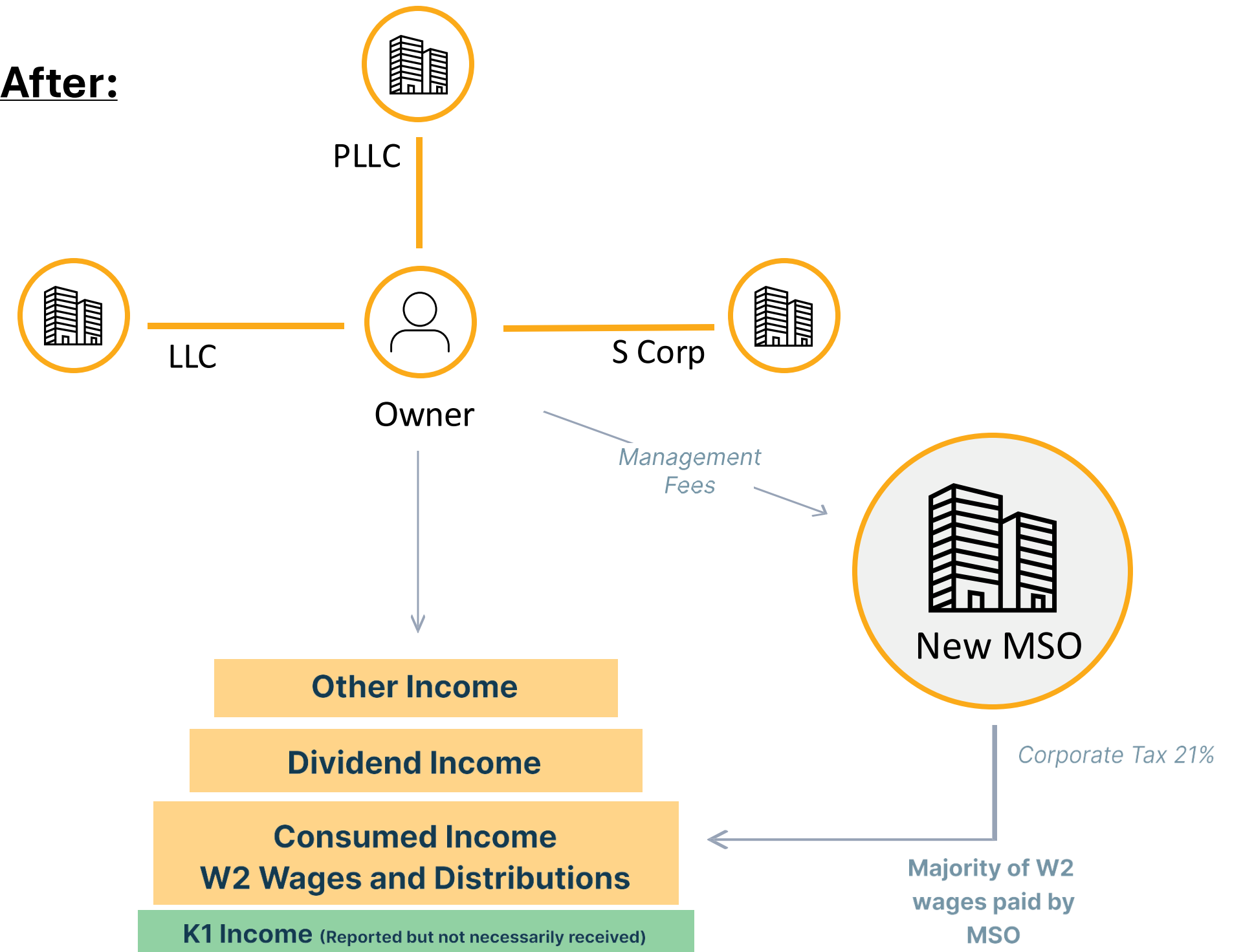
# How Does the MSO Work?

**Before:**



**Personal Taxes**

**After:**



**Personal Taxes**  
**Reduced**