



**CLIENTWHYS TAX UPDATE  
AND REVIEW VIRTUAL CONFERENCE**



# SPEAKERS



---

**Arthur Joseph Werner, JD, MS**



---

**Lee T. Reams, Sr**



# INTRODUCTION



In the fall of each year, to prepare tax professionals for the tax season, *ClientWhys, Inc.* conducts the “1040 Review & Update” Seminar Series.



# OBJECTIVE



The primary objective of the seminar series is to present a *high quality, informative, two-day continuing education seminar* that prepares the attendees for the approaching tax season. Subject matter is carefully selected each year by the speaking and management team to include items of current interest, law and procedural changes and historically requested subject matter.

# FINANCIAL SUCCESS



Financial success of a seminar can be attributed to the seminar's ability to amortize costs over a large number of attendees and locations. For example, the seminar text, which is highly acclaimed as the best in the industry, takes about 3 months and over 900 hours to prepare, a time-consuming feat that is difficult for smaller or individual seminar presenters to match.



# SPEAKER REPRESENTATIONS



ClientWhys employs some of the best speakers in the industry; all are highly competent and outstanding presenters. Because ClientWhys speakers present their material many times, their presentations are well prepared and offer a greater learning benefit to the attendees.

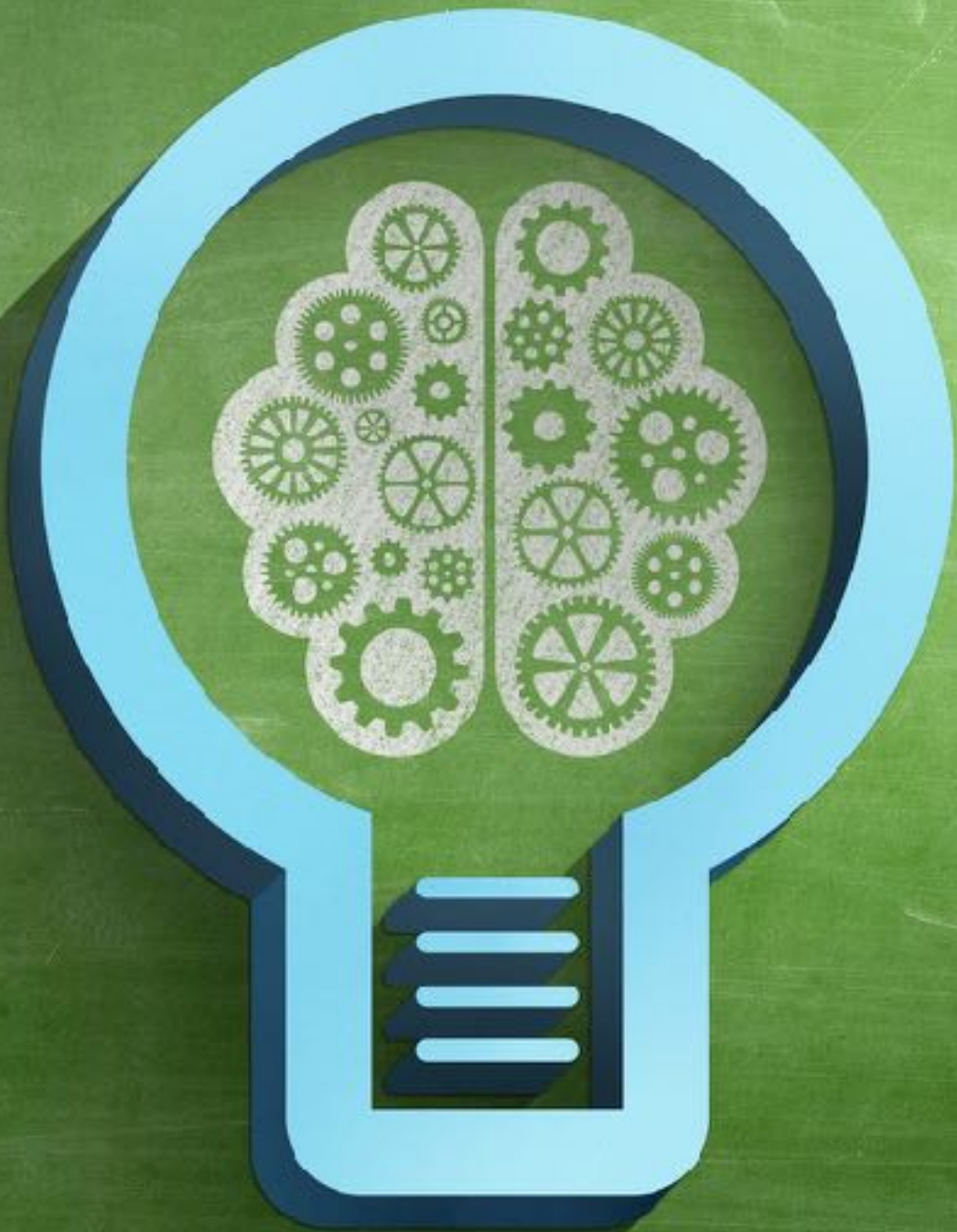
# ACCREDITATION

ClientWhys is a registered CPE sponsor with the following organizations:





# CPE CREDITS



The seminar includes:



**16** hours of live CPE



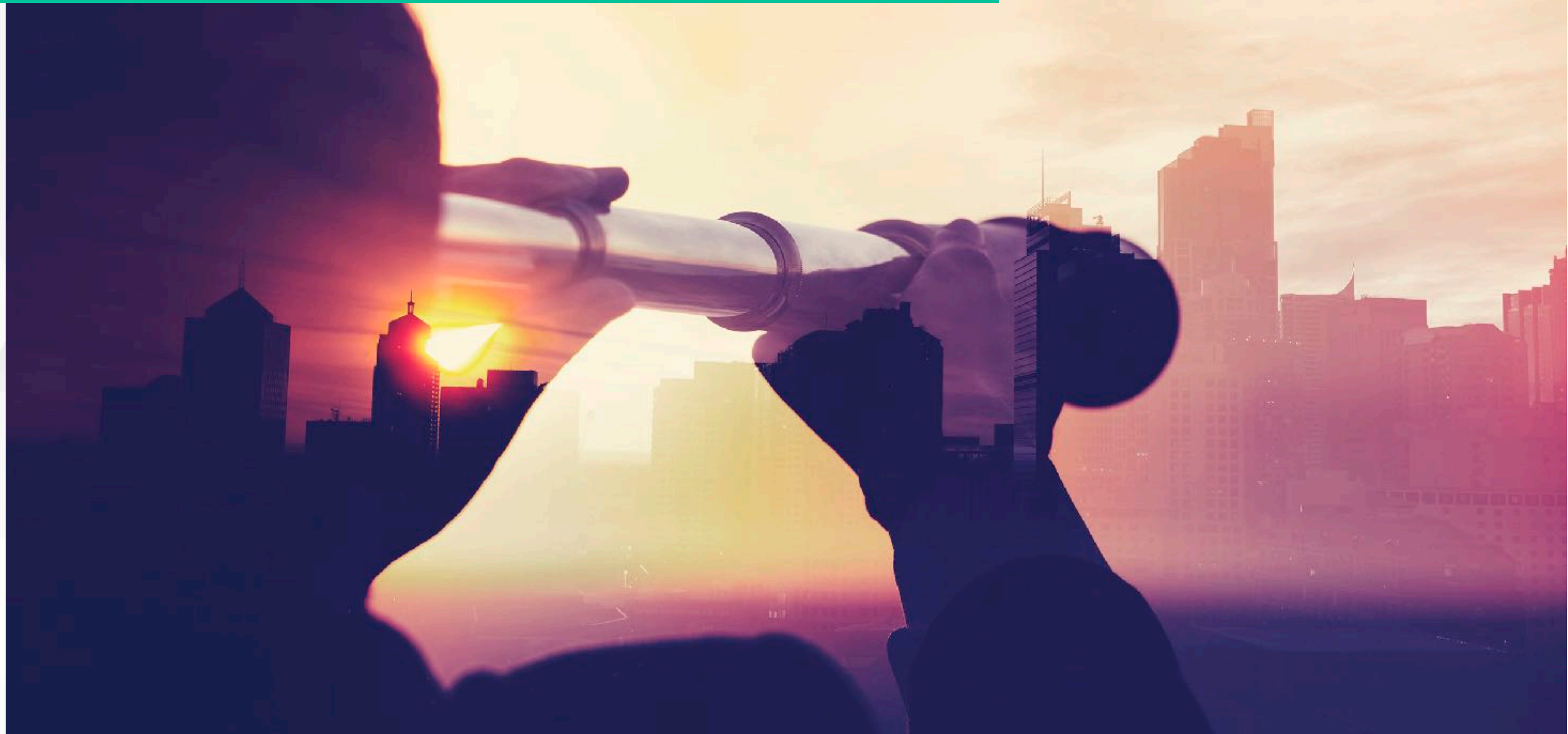
**12** Federal Tax Subjects



**04** Federal Tax Update




# BENEFITS OF AFFILIATION





# BENEFITS OF AFFILIATION

---



Over the past few years, local affiliate chapters of various professional tax organizations which provide seminars for their membership and the local community have found it increasingly difficult to organize financially successful seminars. There appears to be a number of reasons for the problem:

**1** *High investment time and financial cost*

**2** *Availability of speakers*

**3** *Declining attendance*

**4** *COVID-19 and Virtual Events*





Over the past few years, local affiliate chapters of various professional tax organizations which provide seminars for their membership and the local community have found it increasingly difficult to organize financially successful seminars. There appears to be a number of reasons for the problem:

# BENEFITS OF AFFILIATION

## 1 *High investment time and financial cost*

Planning seminar presentations effectively takes a huge time and financial commitment in order to prepare, research, edit and publish high quality course material, reserve meeting sites, etc.





Over the past few years, local affiliate chapters of various professional tax organizations which provide seminars for their membership and the local community have found it increasingly difficult to organize financially successful seminars. There appears to be a number of reasons for the problem:

# BENEFITS OF AFFILIATION

---

## 2 *Availability of speakers*

Single seminar organizers often find it difficult to schedule speakers since qualified speakers are in high demand and are usually committed as seminar series presenters. In addition, the cost of hiring an effective speaker may be prohibitive for a small organization.





Over the past few years, local affiliate chapters of various professional tax organizations which provide seminars for their membership and the local community have found it increasingly difficult to organize financially successful seminars. There appears to be a number of reasons for the problem:

# BENEFITS OF AFFILIATION

---

## 3 *Declining attendance*

Single location seminars have unfortunately fallen victim to declining attendance. This of course only magnifies the financial and time commitments for the affiliates sponsoring them.





Over the past few years, local affiliate chapters of various professional tax organizations which provide seminars for their membership and the local community have found it increasingly difficult to organize financially successful seminars. There appears to be a number of reasons for the problem:

# BENEFITS OF AFFILIATION

---

## 4 *COVID-19 and Virtual Events*

Single physical location seminars have unfortunately fallen victim to declining attendance and COVID-19. This of course only magnifies the financial and time commitments for the affiliates sponsoring them.



# BENEFITS OF AFFILIATION



All the factors cited above have had an impact on the financial stability of single location presentations. The result has been that many society affiliates have had to curtail their local educational programs (including affiliates of larger organizations which provide high quality educational programs on a state or national level).

Understanding these problems, ClientWhys is offering local chapters the opportunity to endorse the “1040 Review & Update” Seminar Series for the benefit of their membership and community.



# BENEFITS OF AFFILIATION



- Superior Seminar
- Highly Acclaimed Seminar Text
- Top Speaker Team
- CA-IRS-EA-NASBA-CPE Accreditation
- Revenue Sharing Program
- No Financial Risk
- Toll-Free and Online Registration by Trained Staff
- Minimal Responsibilities



# CLIENTWHYS RESPONSIBILITIES

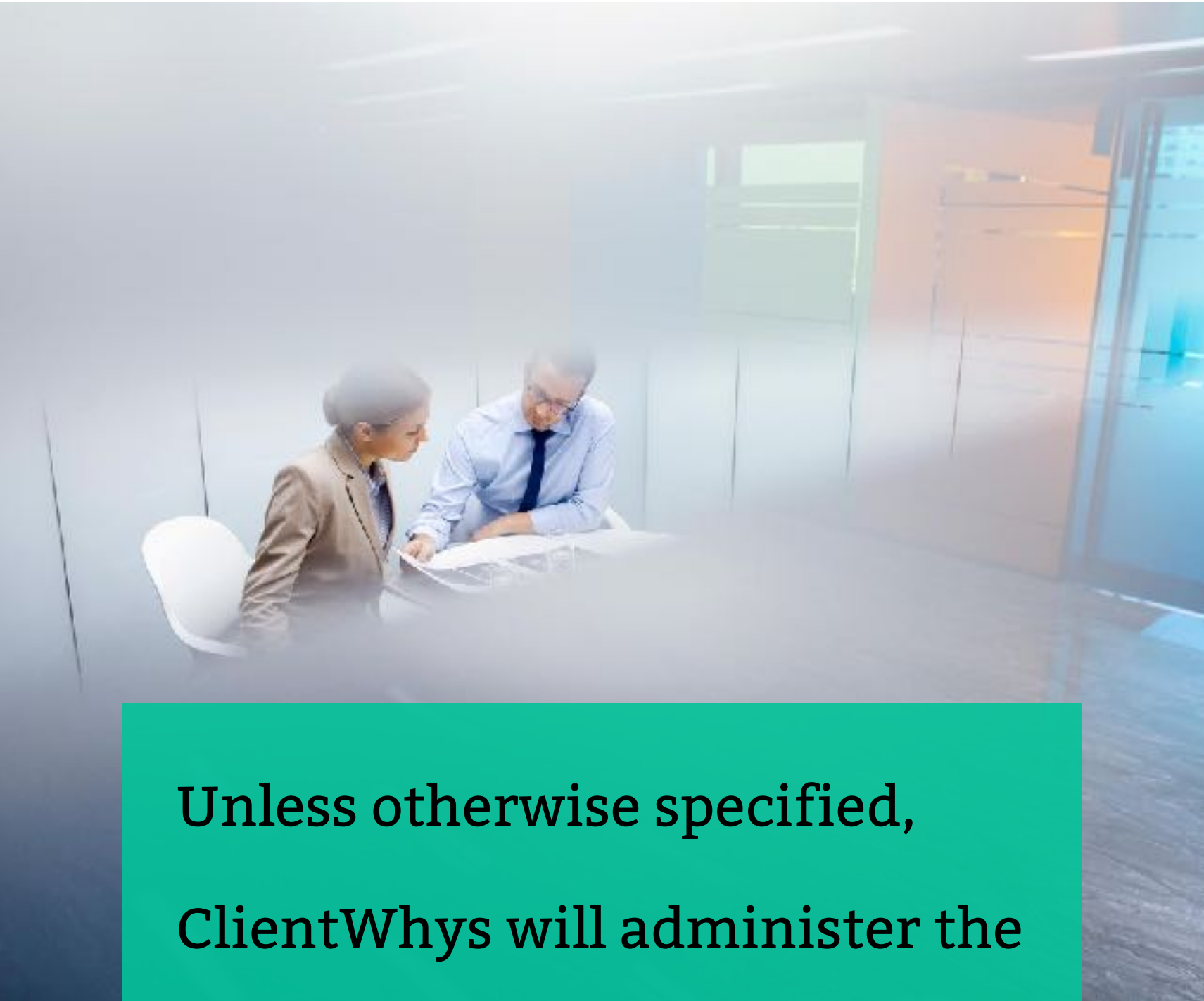
EXHIBIT A





# CLIENTWHYS RESPONSIBILITIES

## EXHIBIT A



Unless otherwise specified, ClientWhys will administer the seminar in its entirety providing the following services and materials:

1

Pay for all expenses of the seminar except the advertising costs incurred by the endorsing organization.

2

Handle all registrations and confirmations for the seminar.

3

Provide speakers under exclusive contract with ClientWhys.

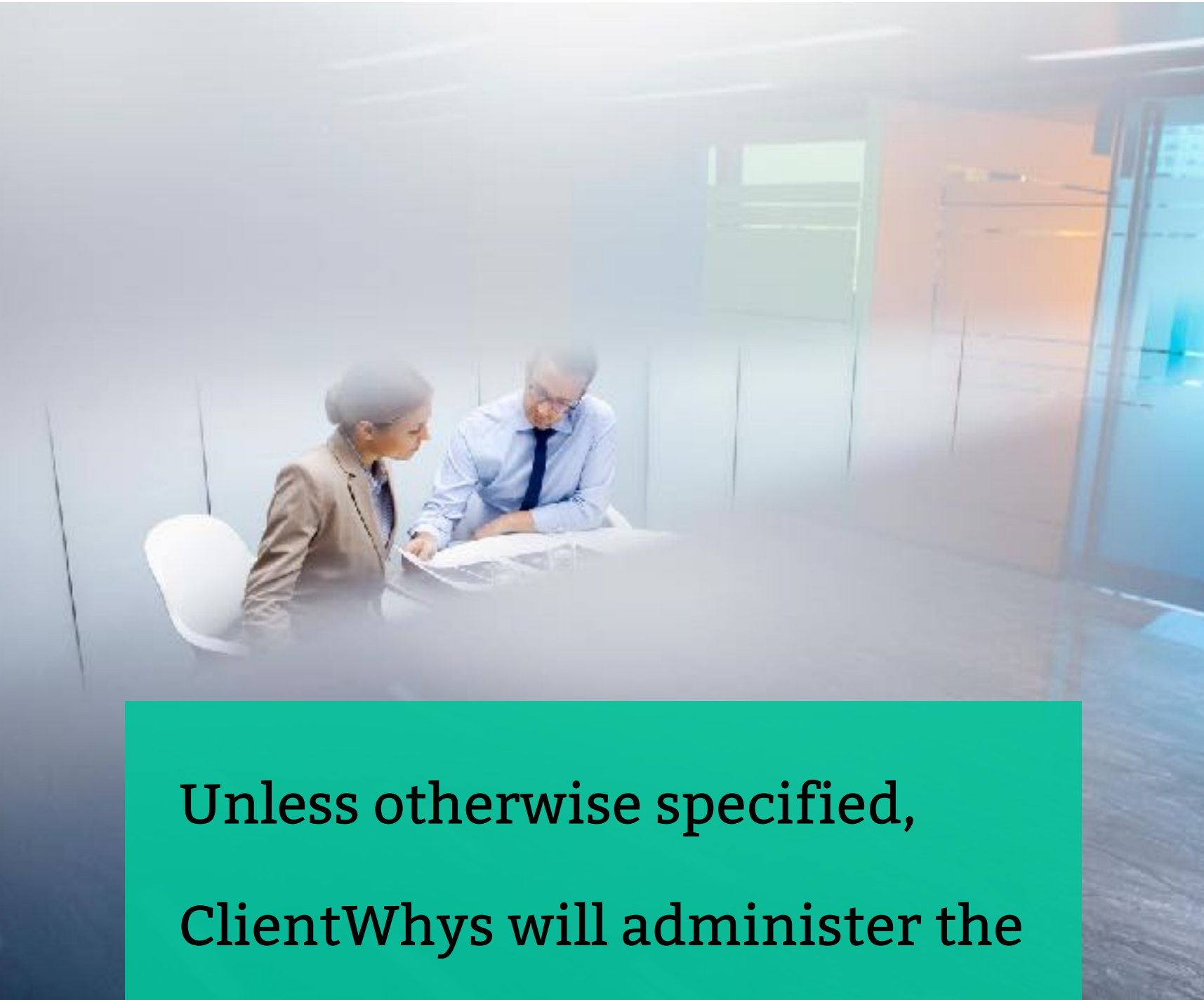
4

Arrange for all speaker travel, meals and accommodations.



# CLIENTWHYS RESPONSIBILITIES

## EXHIBIT A



Unless otherwise specified, ClientWhys will administer the seminar in its entirety providing the following services and materials:

5

Provide online virtual meeting platform with live Q&A.

6

Provide the ClientWhys Big Book of Taxes PDF text, which can double as a comprehensive reference manual for tax season. The manual is updated annually.

7

Administer all CPE accreditation and CPE certificates



# ENDORISING ORGANIZATION RESPONSIBILITIES

EXHIBIT B





# ENDORISING ORGANIZATION RESPONSIBILITIES

## EXHIBIT B



Unless other arrangements are made, ClientWhys will handle all administrative tasks associated with the seminar (see ClientWhys responsibilities).



# ENDORISING ORGANIZATION RESPONSIBILITIES

## EXHIBIT B



### PROMOTION

Since revenue is based on attendance, it is in the endorsing organization's best interest to devote its energy to promoting the seminar to its members and potential attendees.



# ENDORISING ORGANIZATION RESPONSIBILITIES

## EXHIBIT B



ClientWhys will prepare the advertising copy. Although there is no charge to an endorsing organization for the time spent by ClientWhys's graphic design department for designing and producing actual ad copy, the endorsing organization must bear the cost of printing and distributing its own ad material.

In addition, ClientWhys will promote the endorsing chapters involvement online.



# ENDORISING ORGANIZATION RESPONSIBILITIES

## EXHIBIT B



*The chapter must certify distribution by appropriate means.*

Endorsing organizations have available to them several inexpensive avenues of promotion: chapter meetings, chapter bulletins, email newsletter, chapter website, social networking, state chapter bulletins, other chapter-sponsored events, etc.



# ENDORISING ORGANIZATION RESPONSIBILITIES

## EXHIBIT B



### IMPORTANT

Endorsing organizations will only share revenue from seminar registrations directly attributable to that organization's endorsements. Directly attributable means registering on the endorsing organization's registration form or specifically noting that the registration is the result of the organization's endorsement when registering by phone. No retroactive adjustments can be made.

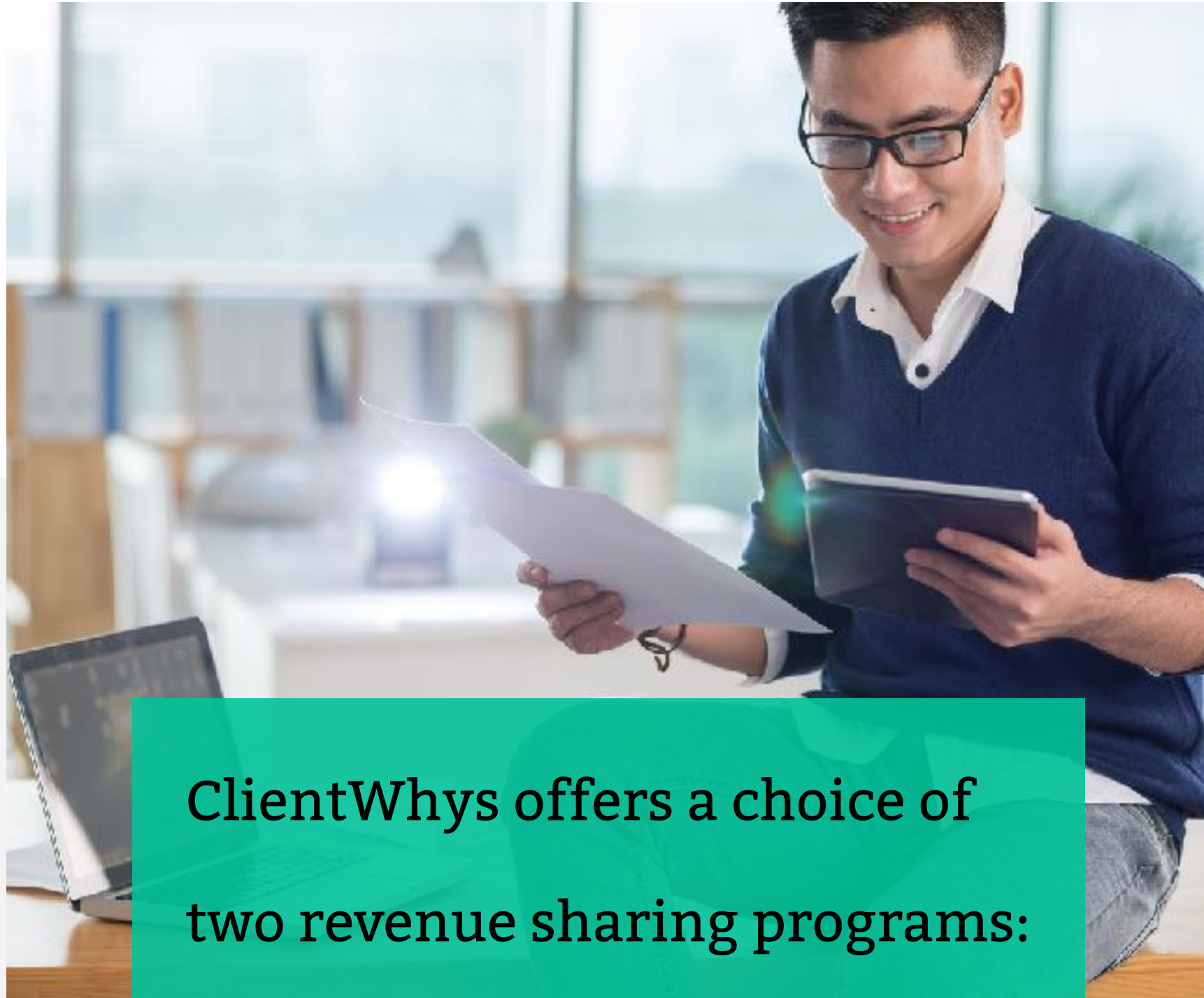


# REVENUE SHARING

EXHIBIT C







ClientWhys offers a choice of two revenue sharing programs: one without and one with financial liability on the part of the endorsing organization.

# REVENUE SHARING

## EXHIBIT C

### WITHOUT FINANCIAL LIABILITY


ClientWhys will pay the organization a share of the registration fee for each of its “qualified” paying attendees as follows:

*\$35.00 for each **Qualified Attendee**, when there are 50 or more qualified attendee registrations; or \$20.00 for each **Qualified Attendee** when there are less than 50 qualified attendee registrations.*



# REVENUE SHARING

## EXHIBIT C



ClientWhys offers a choice of two revenue sharing programs: one without and one with financial liability on the part of the endorsing organization.

A **Qualified Attendee** is defined as either of the following:

- 1** An active member of the endorsing organization who pays a registration fee (regular or early) and whose registration is made on the endorsing organization's registration form or specifically noted when registering by phone. The members may attend any of the seminar times and the endorsing organization will still receive credit. This is helpful when members have other commitments on the date of the specific location endorsed by the organization.
- 2** A non-member of the endorsing organization who pays a registration fee (regular or early) and whose registration is made on the endorsing organization's registration form or specifically noted when registering by phone.





ClientWhys offers a choice of two revenue sharing programs: one without and one with financial liability on the part of the endorsing organization.

# REVENUE SHARING

---

## EXHIBIT C

### **WITH FINANCIAL LIABILITY**

For organizations that wish to assume some or all of the financial liability AND some or part of the administrative responsibilities, custom agreements can be negotiated and formulated. Such arrangements will generally be limited to organizations that guarantee attendance of over 100 “qualified” attendees.





For more information, call us at

**1.800.442.2477 x3**