

# **Business Setup & Client Acquisition**

## **U.S. TAX FIRM COURSE CODE (EA03)**

Take the first step toward a successful career in US taxation from India by registering your company in the US.



# Step by Step Process

01

## Complete US Taxation Training

Become U.S. tax returns preparer (Enrolled agent) in 6 months

02

## Business Setup Services

Form your Company in U.S & India and get your companies Cyber Secured with complete training on SOP.

03

## Cyber Security

Prevent your company from Data breaches and Ransom attacks

04

## Client Onboarding

Get 10 Clients onboarded worth \$5000 per month

05

## Business Support & Maintenance

Get business support for 10 months and Generate revenue.

# About Enrolled Agent Program.

## EA = Tax Prepares in the USA

### 3 Exams | 6 Months

The Enrolled Agent is a highest Tax qualification in US having a privilege of representing taxpayers before the Internal Revenue Service. The EA Exam is officially known as Special Enrollment Exam (SEE).



#### Eligibility Check

- Exam Eligibility:
  - Candidates should be at least 18 years old
  - Candidates must obtain a PTIN to sit for SEE Exams
- Certificate Eligibility:
  - Passing all 3 papers of the SEE Exam is required
  - Completing Form 23 for the licensing application.



#### Pattern and Scoring

- 3 Part exam - Individual Tax, Business Tax, Representation
- 100 MCQs each
- Pass Marks: 105 from a total of 130 marks



#### Why EA in EduVantage Solutions

- Live Classes - Daily (1 hr)
- Recorded lecturers & Backup of live classes.
- Question bank - Learning portal Login
- 50+ hours of Doubt solving
- 50+ hrs of Live Tax filing session
- Test batches
- Exam Registration & PTIN Assistance
- Comprehensive Study materials

## Work on Sales Tax & Payroll Tax.

With Guidance of - Tax managers

### **Sales Tax**

Sales tax is a consumption tax imposed by state and local governments on the sale of goods and services

### **Payroll Tax**

Payroll taxes are taxes imposed on employers and employees, usually calculated as a percentage of the salaries that employers pay their staff

### **Accounting:**

The key financial and accounting tasks include Data Entry (Day to Day Financial Transactions), Bank Reconciliation, Invoicing, Payment of Bills, Month End Report, Payroll Entries, Tax Adjustment Entries, P & L, Balance Sheet, Cash Flow, Notes to FS Line Item, Changes in Equity Report, BSAR (Balance Sheet Accounts Reconciliation), General Ledger, Trial Balance, Cash Book, AP Report, AR Report, AP Aging Reports, AR Aging Reports, Cash Book, AP Report (Per Billing Cycle), AR Report (Per Billing Cycle), and Working Capital Analysis.



### Email Communication

- Clear Subject Line
- Professional Greeting
- Concise Content
- Organized Structure
- Actionable Requests
- Proofread
- Responsive Follow-Up



### Business setup

- U.S. Business Formation
  - Company Formation in the U.S.
  - Employer Identification Number (EIN)
  - Liability Insurance
- Indian Business Formation
  - Company Formation in India with GST
  - LUT Under GST.
- Inbound & Outbound Financial Transactions
  - Inward Remittance from US to Indian Bank Account.
  - Purpose Code Creation.

# Everything about the business.

## Work on Sales Tax & Payroll Tax.

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Comprehensive Cyber security solutions

We ensure your business is protected with state-of-the-art cyber security services including:

- Email Security
- Mobile Security
- Router Encryption
- Ransomware Attack Prevention
- Data Breach Prevention
- Data Backup and Mirror Backup.
- Static IP with VPN:
- Firewall Installation for Static IP & Router.
- Annual Cyber Security Audit Report.
- Cyber Security Employee for Annual Maintenance.



Digital Tools for Business Operations

Equip your business with the tools needed to operate efficiently and securely:

- Customer Management (CRM) Training.
- Customer Retention Training.
- Laptop Touch Screen (Commercial Grade).
- LinkedIn & Instagram Business Pages.
- Website Creation
- Official Business Email ID
- Google Workspace / Microsoft 365 Setup
- US Phone Number with SMS.
- Virtual Office in the US & India



Lead Generation & Business Expansion

Grow your business with guaranteed leads and support for market expansion.

- 10 U.S. Clients from US Businesses.
- Agreement for 1 year with Clients while Onboarding
- Due Diligence and Ethics (Circular 230 Updates)

# Timeline

## Training on E.A course

Month 1

Month 2

Month 3

Month 4

Month 5

Month 6

- Weekly 5 days class (from Monday to Friday) every day 1 hour.
- Daily Live classes
- Recorded Lecturers & Backup of Live classes
- Question Bank
- Doubt solver classes
- Test batches
- Exam registration assistance
- Comprehensive study materials

## Training on Business

Month 7

Month 8

Month 9

Month 10

- Training on Sales & payroll tax
- Standard operating procedure for Business
- CRM, tax software, mail procedure, client handling, and Client retention training.
- Business setup in India and the U.S
- Cyber security installation
- Digital marketing

## Client Onboarding

Month 10

Month 11

Month 12

Month 13

Month 14

Month 15

- 10th month 1st and 2nd client
- 11th month 3rd and 4th client
- 12th month 5th and 6th client
- 13th month 7th and 8th client
- 14th month 9th and 10th client
- 15th month *buffer*

## Client Support and service

Month 10

to

Month 24

- Client service and consultation
- Cybersecurity maintenance

## Over View on U.S. tax Business setup

Duration of the course	20 Months
Tuition fee	7,50,000/-
CLIENTS	2
Eligibility criteria	Speak to the Team to Check your Eligibility
Medium of Teaching	English
Entrance Exam	Not Required
Documents Required	10+2 Certificate Degree completed Certificate, Passport Aadhar Card Pan Card
Currency	Indian Rupees

*\*\*Price includes all the costs and services offered\*\**

## Over View on U.S. tax Business setup

Duration of the course	21 Months
Tuition fee	10,00,000
CLIENTS	4
Eligibility criteria	Speak to the Team to Check your Eligibility
Medium of Teaching	English
Entrance Exam	Not Required
Documents Required	10+2 Certificate Degree completed Certificate, Passport Aadhar Card Pan Card
Currency	Indian Rupees

*\*\*Price includes all the costs and services offered\*\**

## Over View on U.S. tax Business setup

Duration of the course	22 Months
Tuition fee	15,00,000
CLIENTS	6
Eligibility criteria	Speak to the Team to Check your Eligibility
Medium of Teaching	English
Entrance Exam	Not Required
Documents Required	10+2 Certificate Degree completed Certificate, Passport Aadhar Card Pan Card
Currency	Indian Rupees

*\*\*Price includes all the costs and services offered\*\**

## Over View on U.S. tax Business setup

Duration of the course	24 Months
Tuition fee	20,00,000
CLIENTS	10
Eligibility criteria	Speak to the Team to Check your Eligibility
Medium of Teaching	English
Entrance Exam	Not Required
Documents Required	10+2 Certificate Degree completed Certificate, Passport Aadhar Card Pan Card
Currency	Indian Rupees

*\*\*Price includes all the costs and services offered\*\**

# Onboarding Procedure

## Step: 1



Attend the Trial class to check the class

## Step: 2



Attend the Counselling on Business setup to Clear your doubts on U.S. taxation.

## Step: 3



Attend the Counselling on Business setup to Clear your doubts on U.S. taxation.

## Step: 4



Verify the Documents like, Aadhar card, Passport, Degree completed Certificate, PAN card, 10+2 marksheet.

## Step: 5



Visit the office to sign the agreement and complete the transaction of Rs. 1 lakh as a down payment, then register the agreement with the government.

## Step: 6



Complete the Remaining payment in 6 working days and get access to all your login Credentials and Laptop.

## Step: 7



Attend the Orientation class and get the batch time table.



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