

## HOW WE WORK

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**INVOICING.** Statements you receive are for "Addition to Retainer", not a bill for services, per se. A retainer is taken as we spend time on your behalf reviewing your cash flows, tax situations, and property owned. These are examined as a unit to assist in preserving and building your Net Worth. Retainer fees taken are available as a rebate at the closing of property or businesses that we assist you in the purchase or sale of as a buyers broker and/or sellers broker. Further information available on request...also see your Letter of Confirmation.

The retainer amounts we take represent about 1/2 of our time cost. Therefore we now have all clients sign a formal Letter of Confirmation so that there is no misunderstanding of our servicing intent - we gladly review your tax situation but it is only to prepare for or follow up on the larger transaction of brokerage. We are not a bookkeeping service....we look at a much larger picture.

**Costs Down:** To help keep everyone's costs down, we invoice for repeating information found in this booklet.

No cost involved for questions that ask to clarify. NOTE: PLEASE mention the booklet page that is not clear so we will not bill for that time AND we can attempt to clarify the point for future printings.

### OUTSTANDING BALANCES:

IF THERE IS ANY PROBLEM, NOTIFY US AT ONCE OF YOUR INTENTIONS AND PLANS so that our support staff does not refer your balance automatically for collection with fees added at that time.

You rely on our timely work. We rely on your timely cash flow. Recent events have caused us to make policy changes. Once a balance is past due, your work is idled. Note the discount for paying timely. Additional charges apply for balances past the due date. After the due date a retainer will be required to restart services and reestablish credit history with us. Further, after 30 days we notify the government of that the taxpayers reporting / books are incomplete & that we are no longer part of that. After 45 days, Attorney Kathleen Main, Church St, Flint MI will be given your account information for further processing. RDK Collection Agency is also used for certain types of past due balances.

**REINSTATEMENT AFTER LAPSE:** After 30 days, we archive your papers and computer files. There is a min. \$25 cost to reactivate your file. Additionally a min. \$100 retainer must also be received.

### WHAT'S GOOD / WHAT'S NOT:

Tell us what was the most helpful part of this booklet and what was the most difficult, least helpful, part. Send a note with your next payment to us and take a 1 time \$5 discount off the billing for your efforts. Our way of saying "thanks for reading about your new business".