

Dan Hollis - sham

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Dan LinkedIn Profile 1: <https://www.linkedin.com/in/daniel-hollis-10422425a/>

Dan LinkedIn Profile 2: <https://www.linkedin.com/in/daniel-hollis-cwms-4516981b/>

Dan Hollis: physiciansfinancialadvisory.com Physicians Financial Advisory
Corp Email has not worked in 3 weeks.

Connor has ZERO views on a Youtube video: <https://www.youtube.com/watch?v=kLSvvOxDrFg>

Screen shot of two LinkedIn accounts: <https://rb.gy/j42534>

Feb 14th email cancellation

Jude Augusta <jaugusta@maximizeyourpayments.com>

Fri, Feb 14, 2:20 PM (3 days ago)

to Dan, info

The only Agreement is "Tax Planning Entity evaluation, 2 tear [sic] review and 2 year projection"


Dan,

You impress and inspire me with your knowledge, ideas, aspirations, confidence, and grit. That being said – our business relationship is Terminated due to your inaction. I filled out vast amounts of information, created detailed visualizations to make things easy, provided access to all tax and accounting data, spreadsheets detailing income and assets, and anything asked for or intuited to enable you to materialize what you'd stated regarding instead of me [... paying \$25,000 per month in taxes, wouldn't it be nice to pay five or six thousand...]. I didn't say "Contract" is Terminated because it doesn't appear we have a dually executed contract. Therefore the "reasonable person" test applies: "What would a reasonable person, similarly-situated expect." That would be: basic communication, responsiveness appropriate with the timing of upcoming or urgent events, showing up for meetings and reasonably on-time, doing the work stated during the sales process, and basic professionalism. These are lacking as per the below inactions and statements.

1. Your corporate email has not worked since I engaged you in January. Your website does work – but hadn't.

2. DH: Feb 7th: "At first blush we should be able to save you 50% to 60%. I'll have a plan for you by Monday." It's now Friday and I have contacted you or tried to contact you numerous times including your personal email as your professional email does not work.



3. "I'll talk to Jeff XXXX at Cost Seg Studies and the guys at Inception Financial before our first call meeting You were going to engage Jeff XXXX (cost seg guy) & the inception guys before our next call." (which we ended up having to push til Feb 6th as you'd missed the 1st call for 38 minutes at which time I went out to remove snow). Chris XXXX at Inception ended up calling you. Jeff XXXX never got a call.
4. Engage the team for putting my properties in trust.
5. Explore Cost Segregation studies & depreciation for properties as well as trucks
6. Suggest redirecting of how my family's income is earned (what entity name, type, etc.)
7. Handle my 2024 taxes – but I can't get you to reply on that as referenced in my emails Feb 11th and 13th.
8. You did introduce me to a business credit kid.  He has been the subject of securities fraud investigations by the FBI, SEC, state-action lawsuits and regulators.

We're both adults and have overlapping peer circles. I don't hound my vendors. I don't even understand that concept. I am Terminating and requesting remittance of funds as the basic tenets of communication or progressing any of the services above or services at all have been abated, save for the TERRIFICALLY quick responses regarding getting me an agreement and invoice and getting it paid

I expect to hear back from you very swiftly and that you've remitted my funds so that I can hire a tax strategist that comports to a traditionally professional regimen.

Sincerely,

-Physicians Financial Advisory Victim

