

**“Worry-Free” Client Care Package “Audit Protection Plan”**

Beginning 2020 tax year (prepared in 2021), you will be offered enrollment in the Elite Tax and Financial Services, Worry-Free Client Care Package also known as the “Audit Protection Plan” covering your 2020 income tax return for IRS and/or State correspondence response, Audit Representation and/or IRS Tax Identity Theft Form, for one low annual fee. The Client Care Package fee (which includes the Audit Protection Plan) will be added as a separate line item on your Tax Preparation Invoice.

As you know, your return may be selected for review by the taxing authorities. Any audit work, including responding to notices, not due to our error, is covered by this Audit Protection Plan.

If you choose to not to participate in the worry-free Audit Protection Plan, you will be charged our usual hourly billing rates to handle any notices from the IRS or state tax authorities. (currently \$150 per hour)

As provided in the Gold Plan, participation in this program will allow Elite Tax to receive IRS letters and notices faster so we can address any issue before the IRS wants to audit your return and assess additional tax. Your final tax preparation invoice will include a separate line item for the “Basic”, “Silver” or “Gold” protection package. See below for the Plans. Explanations on next page.

<b>Member Benefits (Individual 1040 Tax Returns only)</b>	<b>Gold Membership \$149.95/Yr. POA required</b>	<b>Silver Membership \$89.95/Yr.</b>	<b>Basic Membership \$39.95/Yr.</b>
<b>1) Correspondence Response (if not our fault) (Value \$300 &amp; up)</b>	✓	✓	✓
<b>2) Two (30 min) Phone/email consultation covering W-2 withholding planning (June &amp; Oct), retirement withdraw planning &amp; any planning (Value \$150 &amp; up)</b>	✓	✓	✓
<b>3) IRS Tax Identity Fraud (filing Form 14039)</b>	✓	✓	
<b>4) Up to 1 Hour of in-office tax consultation or business startup consultation (restrictions may apply due to COVID-19) (Value \$150 &amp; up)</b>	✓	✓	
<b>5) 1 amendment for the tax year covered (Value \$150 &amp; up depending on additional forms needed)</b>	✓	✓	
<b>6) Individual IRS &amp; State “Worry-Free” Audit Representation face to face (Value \$3,500 to \$10,000)</b>	✓		

I wish NOT to sign up for the Audit Protection Plan and understand that I will be billed for the above services.

\_\_\_\_\_  
Signature Date  
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I wish to sign up for the Audit Protection Plan 1) Basic \_\_\_\_\_ 2) Silver \_\_\_\_\_ 3) Gold \_\_\_\_\_  
I understand this will be added to my tax preparation fee as a line item on the invoice.

\_\_\_\_\_  
Signature Date

## Discover How to **PROTECT** Yourself From the IRS In Case You Get An Income Tax Notice or Audit...

### Audit Protection Plan Explanations for each line item above

- 1) Correspondence Response – If you receive an IRS notice or state revenue notice for 2020, we will handle it at no additional charge. The IRS sends out letters for various reasons: they need more information from you, they want proof of your child you are claiming, you missed a piece of information on your return, they might want proof of your college expenses that you paid with your 529 plan and the list goes on and on. This does not include if an amendment is required. Usually, we can handle letters without filing amendments. You might think, you can handle the letter and send them what they want. Without even realizing it, you could damage your case.
- 2) Two (30 min) Phone/email consultation covering w-2 withholding planning (June & Oct), retirement withdraw planning and any other tax planning during the year. In the past I have not charged for this service but as the practice grows and more and more clients want this service, I have decided to put it in the Audit Protection Plan in any level of membership.
- 3) IRS Tax Identity Fraud (filing Form 14039) So imagine that you filed your taxes, and you get a notice in the mail that says, *“We cannot process your income tax return because we already have one on file for you.”* This form 14039 is filed with the Internal Revenue Service when you think that you might have been a victim of Tax related identity theft. This form lets the IRS know that someone else has filed a fraudulent tax return in your name and social security number. The Internal Revenue Service will then investigate and work to correct problems caused by the fraudulent filing.
- 4) Up to 1 hour in office tax consultation or business startup consultation. Taxpayers are starting businesses every day. There are things you need to know before you start a business, and we will go over the ins and outs with you. What kind of entities available and what is involved with each entity? You might be subject to sales tax; you might need to file with the county and pay taxes on business property. You will receive resources regarding starting a business.
- 5) One amendment for the tax year covered for any reason. You forgot something or you should have file one way and want to change to another way. For any reason, one amendment federal and/or state will be filed.
- 6) Individual IRS & State “Worry Free” Audit Representation face to face (value \$3,500 to \$10,000) When you are selected for an audit you will pay between \$3,500 and \$10,000 and up for an Enrolled Agent, CPA, or attorney to defend you in an audit. Many people think that IRS representation is automatically included in the tax preparation fee. If we make an error, then we will take responsibility plus pay penalties. Under the law, only an Enrolled Agent, CPA, or attorney besides yourself can represent you before the Internal Revenue Service. We will file a Power of Attorney with this plan and then the IRS must deal directly with us. We will handle all communication and correspondence on your behalf and if necessary, we will meet with the IRS for a face-to-face audit. Clients who participate in this plan will sign a Form 2848, Power of Attorney so Elite Tax can receive notices.