

Frequently Asked Questions

What happens when I receive an audit notice?

As soon as you receive ANY notice or audit letter from the IRS or State, give us a call immediately so we can start resolving the matter.

How long will you defend my return?

We will defend your current year tax return for as long as it can be audited (generally three years).

Will you offer this plan every year?

Yes. We plan to continue to offer our Client Care Package every year.

What happens if I don't file on time?

Your Client Care Package covers tax returns that were filed late.

What happens if I need to file an extension?

Every tax return covered under the Client Care Package, including extensions, will be covered under the plan.

Is my amended return eligible for protection?

Yes. Amended returns are also covered under your Client Care Package.

What if I have multiple state returns?

All related state returns are also covered under the Client Care Package Plan.

What if I change my mind?

You may cancel your Client Care Package which includes the Audit Protection Plan for any reason within 30 days of signing up.

Can I purchase a Client Care Package Plan for any type of tax return?

At this time, we are only offering the Client Care Package Plan for individual tax returns. We hope to add other returns (corporate, trust, gift and estate) at a later date.

Your Recession-Proof “Worry-Free” Peace of Mind Client Care Package Also Includes Tax Identity Fraud Recovery

Tax Identity Fraud is on the rise. **In the past two years alone, more than 1.5 million Americans had their tax identity stolen, with \$6.2 billion fraudulently claimed.** It happens a lot more than you realize. How are you supposed to prove that you are you?

The Client Care Package will give you *full* tax identity recovery *and* audit representation protection if you get any notice from the IRS or State. It will shield you from the frustrating amount of time and money that will be squandered if you try to resolve these issues on your own.

Your Time is Valuable. Don't Let the IRS Disrupt Your Life!

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Yes, You Can Relax
During An IRS Audit...



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If You Receive a Notice, Do You Know How to Respond?

You go to your mailbox, pull everything out looking for something more exciting than junk mail, and there it is - an envelope with the return address for the Internal Revenue Service on it.

Your heart starts to race, and you break out in a sweat. You open it and it's a notice that the IRS is either questioning items on your tax return, or that you're going to be audited. Worse yet, you find out someone has stolen your identity, filed a tax return in your name, and collected a fraudulent refund.

You might wonder why you received the letter from the IRS in the first place since you have your tax returns prepared by a professional. **The truth is - anyone is subject to the scrutiny of the IRS.**

Of course, if we do make any error, we will correct the issue and take responsibility for any penalties or actions with the IRS.

The Client Care Package Includes Audit Protection for One Low Fee

With our Audit Protection Plan, we'll protect you from ever having to deal with the tax authorities by yourself in case you receive a notice from the IRS. And if you are ever summoned to meet with an IRS agent in person, we'll attend on your behalf!

All this happens without any extra charges to you. *Isn't that a relief?*

The Client Care Package Will Save You Time and Money

Again this year, most of our clients who meet certain qualifications will automatically be enrolled into the Silver Level of our "Worry Free" Client Care Service Plan. This level covers your 2025' federal and state income tax return for correspondence response, audit representation and protection defense, tax identity theft, and more for one low annual fee, added as a separate line item on your tax preparation invoice.

Here are the facts: The IRS sent out more than 17 million automated notices last year. When you receive a letter from the IRS, they will **claim** you owe them money or **claim** you didn't report something properly. Unfortunately, with the IRS, you are guilty until proven innocent. They have the power to levy your bank accounts and garnish your wages without a court order.



As you know, your return may be randomly selected for review by the taxing authorities, especially given all the recent and anticipated tax law changes, as well as the \$80 billion the IRS recently received to ramp up their audit and enforcement efforts.

Fees associated with responding to notices, audit representation, and Tax Identity Theft not due to our error are included in the Client Care Package's nominal annual fee.

If you choose not to participate in the Client Care Package Service Plan and you receive a notice for any reason (other than due to our error), are selected for an audit, or have your tax identity stolen, you will be billed at our hourly billing rate for the services that would have been otherwise covered by the Service Plan.

Service Level Benefits	Best Value		
	Gold Level \$189/Yr.	Silver Level \$109/Yr.	Basic Level \$79/Yr.
Priority Phone and Email Inquiries with calls and emails returned within 1 business day	✓	✓	✓
IRS/State Notice/Correspondence Response (minimum value \$275)	✓	✓	✓
Tax Return Copy Replacement – electronic or physical (value of \$50)	✓	✓	
Individual IRS & State "Worry Free" Audit Protection & Defense, up to 10 hours of billable time (note: normal billing is \$325/hour)	✓	✓	
Assistance with IRS Tax Identity Fraud Remediation	✓		
Up to 60 minutes, accumulated, for questions, consultation, tax projection, or review (all provided outside of the tax season...minimum value of \$250)	✓		
Valuable tax tips and videos sent to your inbox.	✓		