

TIMPE CPAs, LLC

Client Care Package Plan Client Disclosure Agreement Form

The IRS is projected to mail out over **170 million automated notices in 2026 to unsuspecting taxpayers** leveraging Artificial Intelligence in addition to relying on their own work force. Most of these notices will be downright incorrect, costing taxpayers millions of dollars to defend and prove their "innocence". In 2026, your chances of receiving one of these notices questioning items on your return or informing you you're being audited or that your tax identity was **stolen has increased significantly due to increased IRS funding, automation, all the new tax law changes, plus the increase in scams plaguing ordinary Americans.**

It can cost anywhere from \$275 to \$500 and up just to respond to an uncomplicated IRS/State computer generated notice that's incorrect. Defending an actual audit or having your tax ID stolen can add real financial stress to your life. Audit representation fees alone can range from \$3,500-\$10,000 and up. To safeguard you from incurring any of these unforeseen expenses, we've created our Client Care Package. For a small annual fee, you can rest assured-we've got you covered under one of our Plans below:

Basic Level Package - \$79 per year

- ✓ We'll reply to email and voicemail inquiries within 1 business day (with the exception being weekends, holidays and vacations).
- ✓ We'll respond to written notices from the IRS, State, or local tax authorities

Silver Level Package - \$109 per year

Includes everything in the Basic Plan, PLUS:

- ✓ We'll replace your tax return one time (electronic or physical copy – normally billed \$50 for this replacement).
- ✓ We'll represent and defend you in case of an IRS or State Income Tax Audit. We'll waive our hourly audit fee for up to 10 hours of audit representation. Additional hours will be billed at our regular rate of \$325/hour. (Value = Regular fee: \$3,500 retainer + \$325/hour).

Gold Level Package - \$189 per year (Best Value!)

Includes everything in the Basic & Silver Plans, PLUS:

- ✓ Up to 60 minutes, accumulated, for questions, consultation, tax projection, or review of current year tax return results (all provided outside of the tax season...minimum value of \$250)
- ✓ We'll assist with the restoration of your tax account and help secure any refunds due to Tax Identity Theft.
- ✓ Valuable tax tips and videos sent to your inbox to help keep you in the loop on important tax changes that may affect you.

This protection becomes effective upon the filing of your 2025 Form 1040 and protects you for 3 years (4 years for state) from the date your 2025 return was filed.

(Opt-OUT) By checking here, I indicate my choice **not** to participate in the Client Care Package outlined above. I understand that I will be subject to additional charges, at the hourly rate in effect at the time, if I receive a notice from the IRS/State questioning an item on my return, or if I receive an audit letter, or if my tax identity is stolen, or if I need any additional services outside the preparation of my tax return, including phone and email inquiries.

Client Signature

Spouse Signature

Date _____

Date _____

“Worry-Free” Client Care Package

Again this year, most of our clients, that meet certain qualifications, will automatically be enrolled into the Silver Level of our “Worry-Free” Client Care Service Plan (which also includes Audit Protection Defense) covering your 2025 federal and state income tax return for correspondence response, Audit Representation and Tax Identity Theft, and much more, for one low annual fee. The Client Care Package fee will be added as a separate line item on your Tax Preparation Invoice.

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), selected for an audit, or had your tax identity stolen, you will be billed for the services that would have been otherwise covered by the Client Care Package Service Plan at our hourly billing rate.

Service Level Benefits	Gold Level \$189/Yr.	Silver Level \$109/Yr.	Basic Level \$79/Yr.
Priority Phone and Email Inquiries (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 – normal billing of \$325/hr)	✓	✓	
Assistance with IRS Tax Identity Fraud Remediation	✓		
Up to 60 minutes, accumulated, for questions, consultation, tax projection, or review of current year tax return results (all provided outside of the tax season...minimum value of \$250)	✓		
Valuable tax tips and videos sent to your inbox to help keep you in the loop on important tax changes that may affect you.	✓		