

Frequently Asked Questions

What happens when I receive a letter from IRS or State?

As soon as you receive a notice from IRS/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 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 Notice Assurance Program every year.

What happens if I need to file an extension?

Every tax return covered under the Notice Assurance Program, including extensions, will be covered.

Is my amended return eligible for protection?

Yes. Amended returns are covered under the Notice Assurance Program.

Can I purchase a Notice Assurance Program for any type of tax return?

The plan covers Form 1040 Individual tax returns pertaining to the tax year in which the fees were charged and prepared by our office.

What are my responsibilities?

1. Our office will not be held liable for any tax, penalty or interest resulting from audit examination. We will pay penalties (but not tax or interest), applicable to any errors made by our office in preparation of the original tax return.
2. The client states that before signing the original tax returns, they will review them to verify that the information contained is true, complete and accurate and was derived from information provided to our office.
3. The client states that they reported all income, 1099s and W-2s and understands that sometimes these documents do not reach the recipient but always reaches the IRS.
4. The client states that they have been advised to keep all records which will support and verify deductions claimed on their tax returns.
5. The client states that they have received complete copies of the tax return and will retain them for as long as necessary.
6. The client agrees that after filing the tax return, if additional information becomes available which impacts the return, our office will be notified promptly.
7. The client agrees to forward all correspondence received from IRS/State within 5 days of receipt.
8. The client agrees to promptly review, sign and mail to the IRS/State any letters prepared by our office on behalf of the client.
9. In the event of an audit, the client agrees to actively and promptly participate and make available, in an organized fashion, supporting schedules and documents.



Lea Garrity, Enrolled Agent

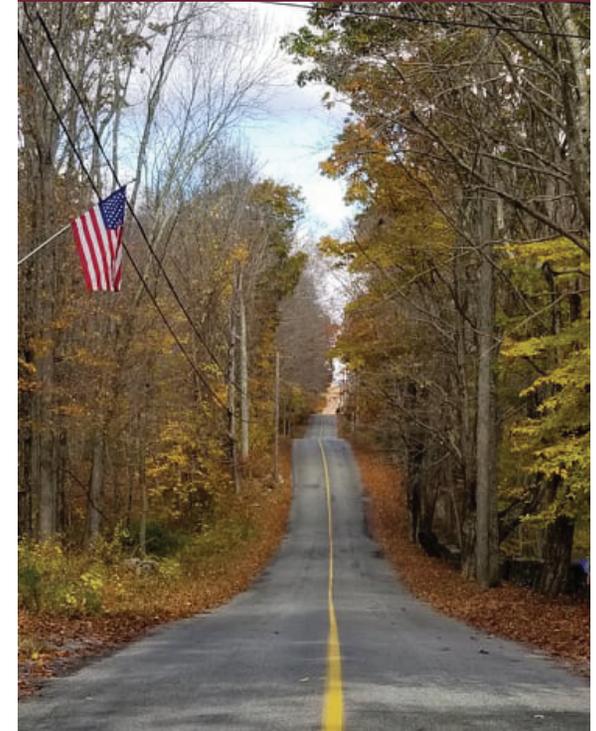
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Knowledge & Integrity with Every Action

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Notice Assurance Program

Relax and take a NAP while we fix your IRS issues...



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The Notice Assurance Program...

Offers you peace of mind knowing when you need it, our office is here to help without the financial burden of high audit fees during an already stressful time.

Due to the aggressive nature of the current IRS and state policies, **clients will be automatically enrolled in our Bronze level Notice Assurance Program.** This small fee is added to your tax preparation invoice and it shields and protects you from having to deal with tax authorities by yourself in the event you receive a notice.

You have the option to “Opt Out” of the program if you choose. However, by opting out, you will be charged our usual hourly rates to handle any notices you receive from IRS or State.

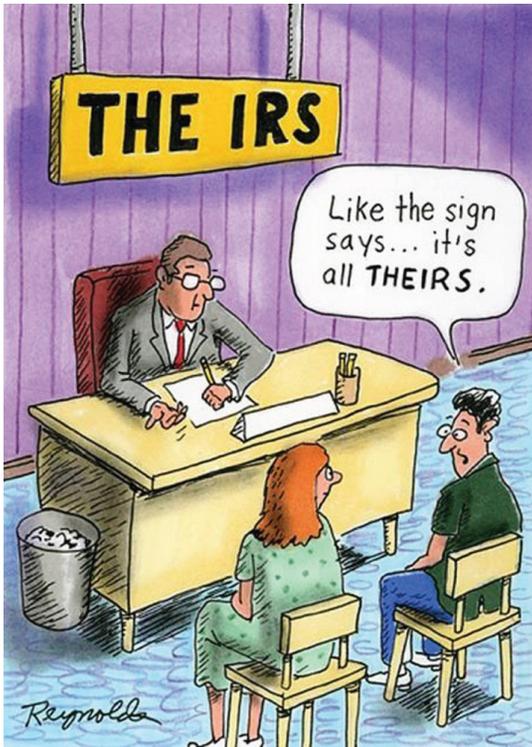
Not all tax returns are eligible for this program. If your return is not eligible, you will not be automatically enrolled and the fee will not be included on your invoice. If your return is ineligible, we will discuss the reason in detail with you.



“Day 487: No word of any rescue, but I am receiving notices from the Internal Revenue Service reminding me that I’m late on my taxes.”

Notice Assurance Program

| Member Benefits | Gold Level \$125 base amount 25% of tax prep fee | Silver Level \$75 per year | Bronze Level \$45 per year |
|---|--|-------------------------------|-------------------------------|
| Correspondence Letters (\$150 value) | ✓ | ✓ | ✓ |
| Amended Returns Due to corrected W2/1099's (\$150 value) | ✓ | ✓ | ✓ |
| Refinance Package (\$125 value) | ✓ | ✓ | |
| Up to 1 Hour Off Season Consultation (\$150 value) | ✓ | ✓ | |
| Transcript Assessment with POA (\$150 value) | ✓ | | |
| Individual IRS & State Audit Representation covers first 8 hours of work (\$1400 value) | ✓ | | |



If You Received A Notice Would You Know What To Do?

Each year the IRS sends out over a million letters (correspondence audits) requesting additional information, reporting mismatched data or indicating other changes to the tax return.

You might wonder why you are receiving a letter in the first place since you have your tax returns prepared by a professional. **Anyone** is subject to the scrutiny of the IRS for various reasons.