



BUSINESS ENTITIES

NOTICE & AUDIT PROTECTION PLAN

IRS NOTICE • STATE NOTICE • AUDIT

Peace of Mind Notice Protection Plan

WHAT IS THE NOTICE PROTECTION PLAN?

Each year the IRS sends millions of letters for various reasons. Some require just a simple response. Others are more complex, sometimes requiring detailed explanations or request of additional documents.

The wrong explanation, response, or no response can bring more letters, an examination/audit of the tax return or cause a needless increase in tax. Tax & Accounting Solutions LLC offers an optional worry-free notice protection plan to all clients for individual tax filing. For enrolled clients, we will review, research and appropriately respond to any letter you receive about your tax return for the year enrolled.

ENROLLMENT FOR THE NOTICE PROTECTION PLAN

Once you select the plan, it will show up as a separate line-item on your next tax preparation invoice. If you want to choose a different plan or opt out, please let us know immediately prior to paying your invoice. Keep in mind, if you do choose to opt out, you will be charged our standard hourly rate for any notices we research and/or respond. Audit representation services are billed at \$350 per hour.

Tier 1	15% of tax preparation (minimum \$300)
<ul style="list-style-type: none"> • IRS/State Correspondence – We will respond to written additional information notices from the IRS or state tax authorities. • IRS/State Representation - Two phone or in-person consultations (20 minutes each), representation 2 hours included (\$900 value) 	

Tier 2	20% of tax preparation (minimum \$1200)
<ul style="list-style-type: none"> • IRS/State Correspondence – We will respond to written additional information notices from the IRS or state tax authorities. • IRS/State Representation – Four phone or in-person consultations (30 minutes each), Representation 6 hours included (\$2800 value) • Up to 2 hours of other, unrelated matters (\$700 value) • Priority communication access (calls and emails returned within 24 hours) • Priority office visit scheduling within 5 business days 	

IF YOU RECEIVE IRS CORRESPONDENCE OR NOTICES

Once you elect to sign up for the plan, Tax & Accounting Solutions will handle all correspondence to resolve letters of inquiry relating to your 2024 federal and state income tax returns on your behalf at no additional charge.

Whenever you receive a notice or letter of inquiry from the federal or state government relating to your 2024 income tax returns, simply send it to us and authorize us to represent you.

For Tier 2, if your 2024 federal or state income tax returns should be audited, Tax & Accounting Solutions will represent you before the IRS or State Tax Agency up to 6 hours of representation services (\$2,800 value).

WHAT THE PLAN COVERS

The Notice Protection Plan includes 2024 federal and state income tax returns. The fee provides coverage for up to two states. Taxpayers filing tax returns in more than two states will be offered additional coverage at \$100 per state and must pay the base fee and additional state(s) fee to be enrolled in the program.

In addition to the peace of mind this program offers, our Notice Protection Plan could save you a substantial amount of money in terms of service fees. Service fees for correspondence inquiries can generally average \$500 - \$2,000. Audit Representation fees generally average \$5,000.

AUDIT PROTECTION PLAN LIMITATIONS

Your purchase of the Notice/Audit Protection Plan is only for the current year tax filing period and must be made before the date of any IRS or State Notices, specifically; the notice must be dated after you have purchased the Notice/Audit Protection Plan.

- We do not provide legal assistance, nor represent you in Federal or State Court.
- Representation does not include the appeals process or Tax Court.
- We do not provide legal assistance in defending issues of civil or criminal fraud.
- We will not reconcile checkbooks, organize records or provide record keeping or bookkeeping services.

AUDIT PROTECTION PLAN EXCLUSIONS

Certain audits, income tax return filings and associated issues of an audit or notices will be excluded from the Protection Plan.

- Pre-existing conditions – If the date on the notice is prior to the date you signed up for coverage.
- Large Businesses – Business entities with gross receipts exceeding \$5 million and/or 10 partners/shareholders/beneficiaries.
- Trust & Estate entities are not covered under the plan.
- Late or delinquent filers – Returns filed after the due date (April 15th or October 15th with a valid extension) will not be covered under the plan.
- Tax protestors – Anyone protesting the taxing of income on economic, religious, legal or constitutional grounds, or other frivolous claims will not be covered under the plan.
- IRS Criminal Investigation (CI) – The Plan will not cover anyone currently under investigation by IRS CI. We will cease performing notice/audit protection services on any audit joined by CI, and will exclude from the plan any related audit or member until completion of the CI.
- Taxes Other Than Income Tax – Your Notice/Audit Protection Plan is limited to the type of income tax return that you signed up for. Payroll tax, gross receipts tax, property tax, duty and local tax, estate and gift tax and compliance audits of pension and profit-sharing plans are excluded from the Plan.

➔ Please note: You are responsible for maintaining adequate records and making them available to us so that we can properly resolve the inquiry or represent you before the taxing authorities. Similarly, you are liable for any additional taxes, penalties or interest that may eventually be assessed. This Notice/Audit Protection Plan applies only to income tax returns for 2022 and does not cover payroll taxes, gross receipts tax, or any other returns. We reserve the right to offer this Notice/Audit Protection Plan on a case-by-case basis.