



INDIVIDUALS

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 requests 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.

AUTOMATIC ENROLLMENT FOR THE NOTICE PROTECTION PLAN

We make it easy and you will be automatically enrolled when we prepare your next tax return. We will select the plan we recommend for you based on your income, assets, etc., and the plan will show up as an optional 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 – Protection Plus Audit Defense	\$0 – Included
<ul style="list-style-type: none"> • Audit Defense • Identity Theft Restoration • \$2,500 Tax Preparation Guarantee • You will work directly with experienced EAs and CPAs who specialize in handling IRS notices 	

Tier 2 – Enhanced Support	15% of tax preparation (not to exceed \$200)
<ul style="list-style-type: none"> • Audit Defense • Identity Theft Restoration • \$2,500 Tax Preparation Guarantee • Tax & Accounting Solutions will take care of initiating and managing the case directly with Protection Plus agents on behalf of the client. 	

IF YOU RECEIVE IRS CORRESPONDENCE OR NOTICES

Tier 1 Protection Plus Audit Defense: If you receive a tax notice or correspondence regarding your 2024 tax filing, you will be responsible for contacting Protection Plus and opening a case directly. An experienced EA or CPA will be assigned to assist you in resolving the matter.

Tier 2 Enhanced Support: With this plan, Tax & Accounting Solutions will manage all tax correspondence & notices on your behalf by directly initiating and overseeing the case with Protection Plus.

If you receive a notice or inquiry from the federal or state government regarding your 2024 income tax returns, simply forward it to us and provide authorization for representation.

AUDIT PROTECTION PLAN LIMITATIONS

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 perform 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.
- 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.