

Tax Maintenance Program

2008 Tax Year

The program provides for the client to be able to have ready access to a tax professional under specific conditions. This will enable you to experience the least amount of tax liability at the end of the tax year, at a very reasonable price.

Our Tax Maintenance Program will include the following benefits:

1. Three (3) phone consultations (20 minutes each for a total of 60 minutes) during the tax year scheduled through our appointment desk.
2. W-4 review to be sure your withholding is correct.
3. Free Audit Advocate Service in the event you are subject to an audit* at **no additional expense** to you for the 2008 year.
4. Answer all IRS notices and correspondence you receive for 2008 tax year.
5. Answer all state notices and correspondence you receive for 2008 tax year.
6. One (1) additional copy of 2007 tax return.
7. \$50 discount on scheduled strategic tax planning appointments.

If you choose not to participate in this program, our billable rates will be as follows:

1. W-4 review - \$69.00.
2. Audit rates start at \$695 (minimum) for the first 4 hours and \$125 per hour after that.
3. Phone consultations - \$125 an hour with a 15 minute minimum (\$31.25).
4. IRS notices and correspondence - \$125 - \$225 per correspondence.
5. IRS & State audit letters - \$125 - \$150 per correspondence.
6. Additional copies of tax returns - \$15 mailed and \$10 for faxed copies.
7. Fall tax planning appointments - \$250.

The program fee is payable at the time of your tax preparation. The W-4 Review and phone consultations are for the year during which the fee is paid. The audit fee and letter answering is for the next three years follow the tax year prepared.

The total savings for this program is over \$1,329.00

Option A \$50.00____
(1040A and 1040)

Option B \$85____
(Corporations, S-Corporations, LLCs, Partnerships)

I ACCEPT the Tax Maintenance Program

Signature

Print Name

Date

I DECLINE the Tax Maintenance Program - I am aware of the charges for additional services.

Signature

Print Name

Date

*Client is responsible for providing supporting documentation for all deductions claimed on tax return.
Information found to be falsified nullifies this contract. No refund will be issued.