

Gold Tax Maintenance Program 2016 Tax Year

The Gold Maintenance Program allows the client 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 Gold Tax Maintenance Program will include the following benefits to our clients:

1. Audit protection in the event you are subject to an audit. Paul Dion CPA will provide this service at **no additional expense** to you for the tax year for up to 10 hours of effort.
2. Four phone consultations (15 minutes each for a total of 60 minutes), 4 emails and 2 office visits during the selected tax year, scheduled through our appointment desk
3. Up to 1 hour of non-covered matters at no additional charge
4. Answer all IRS notices and correspondence you receive for the tax year
5. Answer State notices and correspondence including Audit Letter for the tax year
6. Additional printed copies of returns as needed
7. \$50 discount on our fall tax planning appointments scheduled through our appointment desk
8. Amended returns when necessary

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

1. Audit rates start at \$695 (minimum) for the first 4 hours and \$200 per hour after that
Retainer of \$300.00 is required before we can start
2. Phone consultations - \$200 an hour with a 15 minute minimum (\$50.00)
3. IRS notices and correspondence - \$200 - \$250 per correspondence
4. State notices and Head of Household audit letters - \$200 - \$250 per correspondence
5. Additional copies of tax returns - \$25
6. Fall tax planning appointments - \$300
7. Amended Return \$200.00 for returns we prepared. TBD if not prepared by us

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 **forever for the selected tax year**.
The total savings for this program is over \$1,650.00

___ **\$150 one time fee**

OR

___ **\$12.50 per month when added to the Monthly Plan**

I ACCEPT the Gold Tax Maintenance Program for the following tax year: _____

Signature

Print Name

Date