



Audit Protection Plan **Client Disclosure Agreement Form**

The IRS sent out over **200 million automated notices last year to unsuspecting taxpayers** leveraging technology instead of relying on their own work force. A majority of these notices were downright incorrect that cost taxpayers millions of dollars to defend and prove their “innocence”. Your chances of receiving one of these notices questioning items on your return, or stating that you’re being audited or informing you that your tax identity was stolen is increasing every year.

It can cost anywhere from \$225 to \$500 and up just to respond to an uncomplicated IRS/State computer generated notice. Defending an actual audit or having your tax ID stolen can mean real financial stress to your life. Audit representation fees alone can range from \$3,500-\$10,000 and up. In order to safeguard you from incurring any of these unforeseen expenses, we’ve created our **(Audit Protection Plan)**. For just a small fee, you can rest assured-we’ve got you covered under one of our Plans below:

- Basic Plan - \$59.95/yr. (\$225 value)**
 - ✓ We’ll respond to written notices from the IRS, State, or local tax authorities.

- Silver Plan - \$79.95/yr. (\$3,725 value)**
Includes everything in Basic Plan, PLUS:
 - ✓ We’ll respond to written notices from the IRS, State, or local tax authorities.
 - ✓ **We’ll represent and defend you in case of an IRS or State Tax Income Tax Audit.
 - ✓ We’ll restore your tax account and any refunds due to Tax Identity Theft.

- Gold Plan - \$129.95/yr. (Best Value!) (\$4,550+ value)**
Includes everything in Silver Plan, (\$3,725 value), PLUS:
 - ✓ One hour of additional consultation services at no additional charge. (\$225 value)
 - ✓ We’ll provide copies of your tax returns upon your request at no charge.
 - ✓ 4-15 minute phone calls and two office visits. (\$600 value);
 - ✓ Priority phone, email (returned within 24 hours) and office access;
 - ✓ Office visits scheduled within the same week if available.

****We’ll waive our hourly Audit fee for up to 10 hours of audit representation. Additional hours will be billed at our regular rate of \$225/hour.
(Value = Regular fee: \$2,500 retainer + \$225/hour)**

This protection becomes effective upon the filing of your **2018 (Form 1040 or 1120 or 1065)** and generally lasts for 3 years from the date your return was filed.

(Opt-OUT) By checking here, I indicate my choice *not* to participate in the **(Audit Protection Plan)**. I understand that I will be subject to additional charges at **(Lillian’s Professional Services, LLC hourly billing fee)** if my return is selected for audit, or if I receive notices from a taxing authority questioning items on my return, or if my tax identity is stolen or if I need additional services not included with the preparation of my tax return.

Client Signature

Date

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