Tax Therapy, LLC
Notice Assurance Program

Why should I participate?

IRS and state tax notices and audits are more and more common occurrences. Each year the IRS alone sends out over a million notices requesting additional information, reporting mismatched data, or indicating other changes to a tax return.

Often, the IRS and the state taxing authorities are simply wrong or missing information needed to accept the return as filed. Sometimes they have information reported to them by other parties that does not match the information provided by the taxpayer. Whatever the case may be, it costs the agencies cents to mail the taxpayer a letter and often costs the taxpayer significantly to clear the matter up even if the return was filed accurately the first time.

Notices can be stressful and scary, but Tax Therapy can help. With our Notice Assurance Program, we will cover any correspondence in response to an inquiry for a covered tax year by any taxing authority for which a tax return was prepared by us.

Our Notice Assurance Program is optional. Tax Therapy will assist you with any of these matters at our regular rates if needed:

Filing Authorizations (federal & home state)	$75 + $20/additional state
Reviewing correspondence	$95 / hour
Preparer research	$75 / hour
Admin support	$55 / hour
(Organizing documents, preparing mailings, etc.)	
Audit/Collections Representation	$225 / hour plus expenses

Audits can cost anywhere from a few hundred dollars for a paper audit requiring a single reply on letterhead to thousands of dollars for more complex matters. Much like your car insurance, our Notice Assurance Program gives you peace of mind of knowing that when you need it, help will be there at a significant discount in an otherwise stressful time.

What does the program cover?

Under this program Tax Therapy agrees to provide notice support in accordance with the level of service paid for by the client. Tax Therapy and the client acknowledge that this agreement only covers notices pertaining to personal income tax returns prepared by Tax Therapy for the tax year in which the fee was charged. The program does not cover notices received for other tax periods, other taxpayers or dependents, or those received before the date this agreement is signed. It also gives a 20% discount on Representation costs for the first ten hours of examination (audit) and/or collections.

The program covers notices related to personal income tax return filing only. It does not include refund tracking, issues related to economic impact payments or New Mexico Gross receipts taxes, or any other tax issues. We are happy to assist you with those matters but they will be billed separately from your return preparation and from this program.

Are all returns eligible?

Not all taxpayers and not all personal income tax returns are eligible for this program. If your return is not eligible you will not be enrolled in the program. For example, if your return is filed late and either not preceded by an accurate and timely request for an extension of time to file (or filed after the expiration of the extension), it is ineligible for the Notice Assurance Program. **If your return is ineligible for any reason those details will be discussed with you at that time.**

What are my responsibilities?

1. Tax Therapy is not to be held liable for any tax, penalty, or interest resulting from a tax notice. Tax Therapy will pay penalties, but not the tax or interest, applicable to any errors *made by Tax Therapy* in preparation of the original tax return.
2. The client states that before signing the original tax returns, he/she/they will review them to verify that the information contained is true, complete, and accurate and was derived from information provided to Tax Therapy by the client.
3. The client states that he/she/they reported all income, 1099s, and W-2s and understands that sometimes these documents do not reach the recipient but always reach the IRS.
4. The client states that he/she/they have been advised to keep all records which will support and verify the deductions claimed on their tax return.
5. The client states that he/she/they have received complete copies of the tax return and will retain them for as long as necessary.
6. The client agrees that after filing the tax return, if additional information becomes available to them that affects the filed tax return, he/she/they will notify Tax Therapy promptly. *If it is deemed that amended tax returns are necessary, Tax Therapy will prepare these tax returns for an additional fee.*
7. The client agrees to forward to Tax Therapy all correspondence received from the IRS or other taxing authorities within ten (10) days.
8. The client agrees to promptly review, sign, and mail to the IRS any letters prepared by Tax Therapy on behalf of the client.