TAX YEAR 2025 TAX MAINTENANCE PROGRAM



Our clients routinely need us beyond just tax-filing, so we decided to create the Tax Maintenance Program (TMP), which provides clients access to a wide array of tax planning benefits at a fixed-cost.

Our Tax Maintenance Program (TMP) includes the following benefits:

1) **3 Phone consultations:** (30 minutes each) during the tax year* ($695 value per consultation)
2) **W-4 review:** ensures your paycheck withholding values are correct. ($395 value)
3) **Correspondence/letters for mortgage lenders:** we will work with your lender to assist in any tax-related mortgage qualification needs.** ($195 value)
4) **Free financial planning:** we'll get you connected with Iron Hill Wealth Management, who will go over your financial planning needs. Iron Hill is a firm that RHA has a strategic alliance with. ($695 value)
5) **Audit protection:** protection, in the event you are subject to an audit. This representation is provided at no additional cost to you for the current tax year.*** ($2,500 minimum value)
6) **IRS notices and correspondence:** no longer deal with those pesky notices ($395 minimum value)
7) **State, local, or city tax notices:** send it over and we'll determine the issue ($395 minimum value)
8) **Collections representation**** ($1,500 value)
9) **Notary services:** four notarizations during the tax year ($25 value per notarization)
10) **Additional copies of your tax returns** ($25 value)

Cost for the 2025 TMP: $125 (valued at over $8,000)

Speak to your tax consultant to enroll you in this program, or to learn more.

I accept the 2025 Tax Maintenance Program:

Signature	Print Name	Date

I decline the 2025 Tax Maintenance Program and I am aware of the charges for additional services:

Signature	Print Name	Date

Additional details:

- TMP only applies to services that RHA has provided, per tax year
- Blackout dates: 1/15 to 4/15 and 9/1 to 10/15

* Regarding the 3 phone consultations, calls will be with a Tax Associate for the following consultants: Robert Hall, Stephen Hall, Mike Watson, Phil Duncan, Tony Watson, Daniel Passon. TMP does not apply for year-end planning consultations.

** Correspondence/letters for mortgage lenders does not include the preparation of any financial statements

*** Audit protection does not include audit appeals, reconsideration, tax court petitions, or any returns not prepared by RHA

**** Representation does not include liabilities greater than $25,000, business liabilities, bank levies or liens, payroll tax, sales/use tax, or city tax

RH ROBERT HALL & ASSOCIATES
TAX CONSULTANTS

300 West Glenoaks Blvd, Suite 200, Glendale, CA 91202 | 818.242.4888 | www.roberthalltaxes.com | roberthalltaxes@roberthalltaxes.com