

TAX YEAR **2023** 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 2023 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 2023 Tax Maintenance Program:

Signature [] Print Name [] Date []

I decline the 2023 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

