

The Tax Lady's

Rest Easy Plan

an Audit Assistance Extended Service Plan

Features & Benefits...

If, within the next three years, you receive a letter from the IRS or State authority regarding your current year's tax return, The Tax Lady will represent you for free.*

*Representation means communicating with the IRS or State tax authority via letters, phone calls, face-to-face meetings, and/or amended returns. The Tax Lady has found that most audit cases are resolved within one or two interactions. Therefore, this Plan covers up to two contacts with tax authorities in any combination of the aforesaid ways of corresponding.

Cost...
\$48

Value...

In dollars = \$150-700, depending on the situation
In well-being = Priceless, due to the Rest Easy factor

Benefits over Competitor Plans...

The same person who prepared your tax return will represent you, not someone else or another company

Includes the cost of preparing amended returns,
which is all that's required in most cases*

*Note, this Plan does not include coverage for taxes due and does not seek to find fault. Other plans offer to pay additional taxes due when the tax preparer is at fault. However, the odds of this happening are not in your favor. The Tax Lady finds that, in most instances, clients receive letters from the IRS because they forgot a tax document or did not realize a circumstance was a taxable situation. These instances require a phone call, letter, or amended return. The Rest Easy Plan covers you for these services whereas other company's plans require you to pay for them, unless the preparer is at fault. Please see the reverse side of this paper for The Tax Lady's policy when we are "at fault" for a mistake on your tax return.

'At Fault' Policy Extended to All Clients at No Charge...

If The Tax Lady makes an error on your tax return and a tax authority later informs you that you owe more taxes than you originally reported, we will respond to the IRS or State authority on your behalf at no charge to you and pay any penalties and interest you owe. You simply pay the taxes. Please understand, The Tax Lady can never cause you to owe additional taxes beyond what you legitimately owe. For this reason, you are always responsible for taxes due.

Rest Easy Audit Assistance Extended Service Plan

The Details

This Plan is for the current year's income tax return that was filed through The Tax Lady and accepted by the IRS and/or relevant State tax authorities.

The Rules...

You can purchase the Rest Easy Plan for your current year's tax return until Oct 31st of the same year. Additionally, the Plan:

- only covers your current year's tax return (i.e., only covers one year's return),
- cannot be transferred to someone else,
- covers both federal and state income tax returns,
- applies when tax preparation services are paid for in full and tax returns are accepted by the IRS and/or State tax authorities,
- does not cover any additional taxes due, and
- is available to individuals only, not corporations, estates, or trusts, etc.

Your Responsibility

This Plan and 'At Fault' Policy is Valid When You...

- notify The Tax Lady within 45 days of receiving a letter from a tax authority and provide a full copy for review,
- allow The Tax Lady to dispute assessed taxes that may not be due, and
- you paid for tax preparation services and/or this Plan.

The Plan and 'At Fault' Policy is Invalid When...

- the data you provided to prepare your tax return was false, misleading, or incomplete;
- you are unable to substantiate deductions you took on the return;
- you failed to pay taxes due on time as shown on the return;
- additional taxes due are because of a position you took on the return that is not in accordance with tax laws, even if you took that position per the advice of The Tax Lady (you will know if this applies to you); and
- assessments are made more than three years from the return's filing date.

Please sign and print your name below to purchase the Rest Easy Plan and affirm this document correctly summarizes your understanding of the Plan.

Received & Understood: _____ Date: _____

Print Name: _____ Tax year: _____