

## 2022 Tax Assurance Option Package Choices For Individual Returns

Form 1040 Individual Bronze Tax Package	Form 1040 Individual Silver Tax Package
Completion of all personal income tax returns.	Completion of all personal income tax returns.
Dependent's income tax returns prepared at a discounted rate.	Dependent's income tax returns prepared at a discounted rate.
Estimated tax payments calculated with completion of tax return only.	Recalculation of estimated tax payments based on client input one time. (Not a formal projection.)
Basic phone or email questions not requiring research or calculations.	Basic phone or email questions not requiring research or calculations.
Emails and phone calls returned within three business days.	Emails and phone calls returned within two business days.
Two 15-minute scheduled phone appointments or one 30-minute of scheduled phone or office appointment time.	Up to one hour of scheduled phone or office appointments. A formal projection can be part of this time.
Review and explain any notices received by any taxing agencies. Explanation only but no responding to any notices.	Reply to any notices, such as CP-2000, income matching letters (i.e. unreported income) or verification notices from ANY taxing agency.
	Includes IRS letter monitoring.
	**Recalculation of correct tax with missing income may be an extra charge depending on specifics.
	**Does not include Office or Field Audits.
	Includes up to 4 hours of representation with any taxing agencies. This will include assisting with Installment Agreements.
	If the 1040 has more than 10 rentals or business Schedule C's with more than \$250,000 gross receipts, the Assurance Option Cost is <b>\$75</b> .
<b>Cost: Included in Tax Return Fees</b>	<b>Cost: Regular Tax Return Fee + AO Fee</b>
	<i>Office Use Only:     \$45       \$75</i>

**Make a choice between the two options and only sign on one side.**

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Spouse Signature

**Our Representation Fees are \$135 per hour. Please keep this in mind as you select your option.**

Revised 01/08/2024