

2021 Tax Assurance Option Package Choices For Individual Returns

Individual Bronze Tax Package	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.
Cost: Included in Tax Return Fees	Cost: Regular Tax Return Fee + \$45

Taxpayer Signature

Taxpayer Signature

Spouse Signature

Spouse Signature

Our Representation Fees are \$125 per hour. Please keep this in mind as you select your option.