

Activate Your AUDIT PROTECTION In 3 Easy Steps!

**To Activate your Audit Protection
Please do the following:**

- 1. Print the Agreement Form**
- 2. Initial each page of the Agreement Form & complete the back page**
- 3. Return ALL pages by fax or mail to:**

FAX

253-566-1656

MAIL

**MTM Audit Dept
PO Box 65432
Tacoma WA 98464**

Members Only

AUDIT PROTECTION

Most people do not take all the deductions they are entitled to for the fear of being audited by the IRS. By being a member of the *Monthly Tax Mentor* Program you are entitled to register for Audit Protection - we will stand behind you and your tax deductions. Never fear an audit again! Because of our extensive background and knowledge of the IRS code and procedures, you can relax and not worry about the IRS any more. Overseen by **Former Senior Trial Attorney for the IRS, Scott Estill**, our outstanding record of handling audits and Tax Court cases is even more impressive - we have NEVER lost a case for our clients and in some instances we have found where the IRS has owed the client money! All Monthly Tax Mentor members who register for Audit Protection will be covered as long as their account is current and in good standing.

**It is your responsibility to activate your Audit Protection.
No refunds will be given due to non-activation!**

***Monthly Tax Mentor Audit Protection
is a subsidiary of
Tax Strategies & Solutions, Inc.***

Monthly Tax Mentor

AUDIT PROTECTION AGREEMENT FORM

This audit coverage is retroactive for three (3) years and includes any Federal Income Tax audit for the enrollee, subject to the limitations stated in the agreement. If the Monthly Tax Mentor Audit Protection is cancelled or not renewed while client is in an audit, all services will be stopped effective the cancelation or renewal date.

The Monthly Tax Mentor Audit Protection is provided by Tax Strategies and Solutions, Inc. and must be activated prior to the date the audit is initiated by the IRS in order for there to be coverage!!

WHO IS COVERED?

Tax Strategies & Solutions, Inc. Provides personal audit protection for tax payers, who are U.S. citizens, who have received taxable income and who filed 1040 or 1040ez form federal tax return during the year in question.

For businesses, we will cover you if the business is any for-profit venture which receives income and/or incurs expenses and reports these figures on an IRS Form 1120, 1120S, 1065, Schedule F, or Schedule C. Furthermore, businesses are limited to gross receipts equal to or less than \$1,000,000 per year to be eligible for audit representation from us.

Please note that only one business or one individual (or married couple filing a joint return) is covered per audit representation fee paid. If you have paid for personal audit representation and would like coverage for any business(es) please call us at 800-217-2703. Audit Protection is only active for the person or entity listed on this agreement

WHAT MUST YOU DO IF YOU RECEIVE AN AUDIT NOTICE?

In the event that you receive an IRS audit notice, it is necessary for you to immediately notify us by fax, telephone, or mail so that we may immediately begin to protect your financial interests. We need immediate notification (within no more than 10 days after receiving the audit notice) as time is of the essence with respect to tax audits. Any delay may have adverse consequences to you, your rights, and your overall likelihood of success. Do not contact the IRS prior to contacting us. In most instances, you will never need to speak to any tax auditors while we represent you.

If you wish to fax us the audit notice, please do so at **253-566-1656**. You can also mail the notice to Tax **Strategies & Solutions, Inc. * PO Box 65432 * Tacoma, WA 98464**. We will confirm receipt of the audit notice with an email, usually within 24 hours of receipt. Please make sure you email is legible on the enrolment form!.

Initials: _____

Monthly Tax Mentor

AUDIT PROTECTION AGREEMENT FORM

WE NEED YOUR HELP DURING AN AUDIT:

The likelihood of success increases greatly when the person being audited participates fully in the audit process. We cannot do the best job of representing your interests without your complete cooperation. We expect you to:

- Provide copies of all records involved in your audit. These may include bank statements, canceled checks, receipts, books and ledgers, loan documents, and any other documents requested. We will communicate with you and will not make any strategic decisions without first consulting you.
- Provide copies of the tax returns filed for the audit years, along with any other tax returns which we request.
- Execute copies of the IRS Power of Attorney we provide to you so that we may speak to the IRS agents on your behalf.

WHAT WE PROVIDE:

Should you be audited, we will provide the services of Scott Estill and Stephanie Long's law firm, Estill and Long, LLC. At our discretion, you will receive the services of two or more attorneys, depending upon your needs and the overall complexity of your audit. We may also utilize the services of a CPA, Enrolled Agent or other law firm staff member as the needs of any particular audit dictate. All audit work will be overseen and supervised by Scott Estill and/or Stephanie Long, both licensed tax attorneys with considerable IRS audit and Tax Court experience.

WHAT WE COVER:

- IRS income tax audits performed by mail, or in person (either at the IRS offices or our offices). This coverage is retroactive for a period of three (3) years as long as you are current with your audit protection enrollment and fees on the date that you receive your audit notice. We do not cover audits that begin prior to your date of enrollment or audits you had reasonable notice prior to joining Estill & Long, LLC as a client.
- Complete federal income tax audit representation including all meetings with a Revenue Agent and his or her group manager, Appeals and IRS Area Counsel. This includes telephone conversations, correspondence, or other efforts to settle cases or problems short of litigation or after litigation has commenced.
- Investigation and research, including legal research, in ascertaining facts, finding and taking statements of witnesses, and gathering of any other information relative to your case or problem.
- Should the IRS agent handling your audit be unreasonable and/or unprofessional, we may involve the Taxpayer Advocates' Office.
- Litigation services consisting of appearances on your behalf before any judicial, quasi-judicial, or administrative agency of the IRS in cases of adversary proceedings involving your case, including U.S. Tax Court representation.

Initials: _____

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WHAT WE DO NOT COVER:

- We will not pay for any court costs, filing fees, copy costs, travel expenses, expert witness fees, service fees, fees for depositions, fees of a public stenographer and bond premiums in connection with adversary proceedings involving your case.
- Any legal or tax services not relating to a Federal Tax audit. These include, but are not limited to , any return preparation or filing, bookkeeping, or tax advice not relating to an audit, penalty abatements, Offers in Compromise, Innocent Spouse claims (unless raised during the audit), Collection notices, Claims for Refunds, Tax Lien issues, wage garnishment, or other levies, or any other tax matter not specifically related to a tax audit. These services are available for an additional hourly fee.
- Any tax audit that is not specifically designated as a Federal Income Tax audit. This would also include any state income tax audits.
- Any tax audit relating to an Estate, Trust, Non-Profit organization, or other entity which is not either a for-profit business or an individual.
- Any IRS tax audit of which the client was in any way on notice of PRIOR to being enrolled in this program
- Any IRS criminal investigations.
- Any services or advice, which does not involve the immediate and direct interest of the person enrolled.
- Any IRS audit in which fraud (either criminal or civil) is alleged (even if the IRS will not likely prevail). Any audit involving fraud will void the audit coverage. These audits can be handled at an additional fee should you choose to use our representation services.
- Any service not specifically included in the “what we cover” section.

OUR GUARANTEE TO YOU:

We promise that we will defend you in any audit with the utmost in professional care and expertise. In connection with our promise, you can be assured that we will explain and protect your rights as a taxpayer throughout the audit.

We will treat your case with complete and total privacy and confidentiality, and we will not disclose to anyone the information you give us, except as necessary to represent you in your audit. You always have the right to know why we are asking you for information, how we will use it, and what will likely happen if you do not provide the information.

Initials: _____

Monthly Tax Mentor

AUDIT PROTECTION AGREEMENT FORM

I HAVE READ AND UNDERSTAND THE ABOVE TERMS AND CONDITIONS.

Name: _____ Date _____

Signature: _____

Spouse: _____ Date _____

Signature: _____

Address: _____

City: _____ ST _____ Zip _____

Email: _____

Home: (_____) _____ - _____ Work: (_____) _____ - _____

Cell: (_____) _____ - _____ Fax: (_____) _____ - _____

Please contact us for more information:

Tax Strategies & Solutions / Monthly Tax Mentor
PO Box 65432
Tacoma, WA 98464
253-566-6111 (Telephone)
800-217-2703 (Toll Free)
253-566-1656 (Fax)
Email – info@taxsavi.com

Initials: _____