

Frequently Asked Questions

What happens when I receive an audit notice?

As soon as you receive a CP 2000 notice or audit letter from the IRS or State, give us a call immediately so we can start resolving the matter.

How long will you defend my return?

We will defend your current year tax return for as long as it can be audited (generally three years).

Will you offer this plan every year?

Yes. We plan to continue to offer our Client Care Package every year.

What happens if I don't file on time?

Your Client Care Package covers tax returns that were filed late.

What happens if I need to file an extension?

Every tax return covered under the Client Care Package, including extensions, is covered.

Is my amended return eligible for protection?

Yes. Amended returns are also covered under your Client Care Package. There will be an additional charge in Basic & Silver plans for the preparation of the amended return itself.

What if I have multiple state returns?

All related state returns are also covered under the Client Care Package Plan.

What is your guarantee?

You may cancel your Client Care Package, which includes the Audit Protection Plan, for any reason within 30 days of signing up.

Can I purchase a Client Care Package Plan for any type of tax return?

You can purchase a Client Care Package Plan for the following types of tax returns:

- Form 1040 - Individual
- Form 1120 or 1120S - Corporation
- Form 1065 – LLC/Partnership
- Form 1041 – Trust and Estate
- Form 990N – E-Postcard/Tax Exempt

Your Client Care Package Also Includes Tax Identity Fraud Recovery ...

Tax Identity Fraud is on the rise. **In the past two years alone, more than 1,900,000 Americans had their tax identity stolen, with \$7.6 billion that was fraudulently claimed.** So, yes, it happens a lot more than you realize. How are you supposed to prove that you are you?

The Client Care Package will give you *full tax identity recovery and audit representation* protection if you get any notice from the IRS or State. It will shield you from the time, money, and frustration you will undergo if you try to resolve these issues on your own.

Your Time Is Valuable. Don't Let the IRS Disrupt Your Life!

CERTIFIED TAX EXPERTS

2255 GLADES RD. STE 324A BOCA RATON, FL, 33431

2300 W SAHARA AVENUE STE 800, LAS VEGAS, NV 89102

PO BOX 847, BURNSVILLE, NC 28714

561-329-4048



CLIENT CARE
★ PACKAGE ★

1040

**Yes, You Can Relax
During An IRS Audit...**



CTE

CERTIFIED TAX EXPERTS INC



If you were to receive a Notice from the IRS, do you know how to respond?

Last year the IRS sent out 170 million notices, many of them generated by AI and were incorrect. Even when your tax return has been carefully and professionally prepared by us, the IRS still issues notices for all kinds of reasons. Most of these, right or wrong, have to be formally responded to.

The Client Care Package includes IRS/State Notice & correspondence responses. Of course, if we make an error, we will correct the issue and take responsibility for any penalties or actions with the IRS.

The Client Care Package also includes Audit Protection...

Our Client Care Package includes Audit Protection as well. We'll protect you from ever having to deal with the tax authorities by yourself in case you get a notice from the IRS. And if you are ever summoned to meet with an IRS agent in person, we'll attend on your behalf!

Alternative Option to the Client Care Package...

Without our Audit Protection coverage in place, receiving an audit notification can cost you anywhere from \$3,500 to \$10,000 and up to have a licensed tax professional defend you in an audit.

Here are the facts: The IRS sent out more than 170 million automated notices last year. When you receive a letter from the IRS, they will *claim* you owe them money or *claim* you didn't report something properly, which you will have to defend, because with the IRS you are guilty until proven innocent. They have the power to levy your bank accounts and garnish your wages without a court order!



The Client Care Package Will Save You Time and Money ...

And peace of mind. For a small annual fee that's added to your tax preparation invoice, we'll shield and protect you from ever having to deal with the tax authorities by yourself in the event you get a notice from the IRS or state tax authorities questioning an item on your return.

And if you ever have to meet with an agent in person, we'll attend the meeting on your behalf.

You have the option to “opt out” of the plan if you choose; otherwise, you can agree to the protection by paying the fee before we file your return. But if you choose to “opt out” of the Client Care Package, you will be charged our usual hourly rates to handle any and all notices you receive from the IRS or State questioning items on your return.

Service Level Benefits	Best Value		
	Gold \$99.95 / Yr (7,725+ Value)	Silver \$60.00 / Yr (\$4,995+ Value)	Basic \$19.95 / Yr (\$500 Value)
IRS/State Notice/Correspondence Response (\$275 Value)	✓	✓	✓
Form 8821 Preparation	✓	✓	✓
Individual IRS & State “Worry-Free” Audit Protection & Defense (\$3,500 to \$10,000 Value)	✓	✓	
IRS Tax Identity Theft Remediation	✓	✓	
Schedule C, D and E Form Preparation	✓	✓	
Up to 1 Hour of Consultation Time At NO Additional Charge (\$250 Value)	✓		
File an Amended Tax Return	✓		
Priority Phone calls and Email inquiries – Zoom meetings scheduled for the same week, if available	✓		



Discover How to **PROTECT** Your Peace of Mind!

Have confidence knowing that if the IRS or state ever send you a notice, you'll never have to face it alone.

Dear Valued Client,

We know how unsettling it can be to open your mailbox and see an envelope from the IRS or your state tax agency. Your heart skips a beat, and questions start racing through your mind: *“What did I do wrong?” “Is this serious?” “What do I do next?”*



If that ever happens, please know—you're not alone. Even when your tax return has been carefully and professionally prepared by us, the IRS still issues millions of notices every year for all kinds of reasons. Many are triggered automatically, or even sent in error. It's frustrating, confusing, and often time-consuming—and each one usually requires a formal response - but we're here to make sure you never have to deal with that stress on your own.

In 2024, the IRS issued more than 170 million notices, many of them generated by artificial intelligence and automation. The reality is that good, honest taxpayers like you are being contacted more frequently—and it often takes months to resolve. That's why we created our **Client Care Package**: to give you peace of mind, knowing that if something comes up, we've got your back.

Life's Too Short to Spend It on Hold with the IRS

When you receive a notice, it can feel intimidating—but handling it yourself doesn't have to be your only option. Between long wait times, confusing language, and inconsistent answers, it's easy to get overwhelmed. Instead of spending hours trying to interpret complicated IRS letters, you can simply forward the notice to us, and we'll take it from there.

Our team speaks the IRS's language, knows who to contact, and has direct practitioner lines that get us to the right people faster. We'll respond on your behalf, communicate with the agency in writing if necessary, and resolve the issue—all while keeping you informed and worry-free.

Sometimes, these notices are triggered simply because a piece of information was missing or reported differently than what the IRS has on file. It happens more often than you might think—maybe a W-2 or 1099 was inadvertently not provided to us, a dependent's Social Security number was entered

incorrectly, or a payment from the Child Tax Credit or stimulus wasn't reflected in the records the IRS received. None of this means you did anything wrong—it's just that the IRS's system flags anything that doesn't perfectly match their data. And when that happens, they automatically send a notice, even if the issue is small or easily corrected. Of course, if made the error we'll cover any penalty you may incur.

You Deserve to Feel Protected

You've worked hard for your peace of mind, and that's exactly what our **Client Care Package** provides. Whether it's an IRS letter, a notice about a missing form, in the rare case an audit, or even an identity- (SSN) theft situation, you'll have expert help on your side from the very beginning.

With this service, you'll never have to:

- Guess what the IRS notice means.
- Spend hours on the phone trying to reach the right person.
- Pay hundreds or thousands out-of-pocket for representation after the fact.

We created this package because we care about your time, your finances, and your wellbeing—not because we want to scare you, but because we want you to feel **supported and protected** in every situation.

Affordable, Ongoing Protection You Can Count On

Normally, hiring us to handle an IRS audit cost between \$3,500 and \$10,000—or more. But with our Client Care Package, you'll be fully covered for just a small annual fee that's automatically added to your tax preparation invoice. You can opt out if you choose—but most clients tell us the relief and protection it provides is priceless.

Even notices that seem like it's a simple matter to resolve need to be formally responded to and can take 1-3 hours of our time plus follow-up to make sure the IRS corrected it accordingly.

All this coverage is all a part of our Client Care Package. For a small annual fee that's added to your tax preparation invoice, we'll shield and protect you from ever having to deal with the tax authorities in case you get a notice from the IRS or state tax authorities questioning an item(s) on your tax return that we filed on your behalf.

All This Happens With One Low Annual Fee

Beginning in 2026, when your return is prepared by us, we will determine which Client Care Package Service Level best fits your needs and this fee will be automatically added to your invoice. You have the option to "opt out" of the Package if you choose, and we will remove the amount from your invoice; otherwise, you can agree to the protection by paying the small annual fee.

If you choose to "opt out" and cancel the "worry-free" Client Care Package (which includes audit protection too), you will be charged our usual hourly billing rates to handle ANY notices and inquiries from the IRS or state tax authorities. A simple formal response to the IRS/State can run you between \$200 to \$1,000 without the client care package.

Here are the different Client Care Package levels available:

Service Level Benefits 	Gold Level \$99.95/Yr. (\$7,725+ Value)	Silver Level \$60.00/Yr. (\$4,995 Value)	Basic Level \$19.95/Yr. (\$225 Value)
IRS/State Notice/Correspondence Response (\$275 Value)	✓	✓	✓
Form 8821 Preparation	✓	✓	✓
IRS Tax Identity Fraud Remediation	✓	✓	
Schedule C, D and E Form Preparation	✓	✓	
Up to 1 Hour of Consultation Time At NO Additional Charge (\$275 Value)	✓	✓	
File an Amended Tax Return	✓	✓	
Priority Phone and Email Inquiries	✓		
Zoom Meetings Scheduled Within the same week if Available	✓		
Individual IRS & State “Worry-Free” Audit Protection & Defense (\$3,500 to \$10,000 Value)	✓		

We also offer the same protection for Corporations and Partnerships (Forms 1120, 1120-S 1065).

Please call us for information on our customized business client care packages. You can sleep better tonight knowing you are protected as we have your back!

Sincerely,

William Tyler
 Certified Tax Experts, Inc.

“Worry-Free” Client Care Package (“CCP”)

Beginning this year, you will be automatically enrolled into the Certified Tax Experts, Inc. “Worry-Free” Client Care Package (which also includes Audit Protection Defense) covering your 2025 federal and state income tax returns for correspondence/notice response, Audit Representation and Tax Identity Theft, and much more, for one low annual fee. The Client Care Package fee will be added onto your Tax Preparation Invoice. Please see enclosures which explains the Client Care Package in detail.

As you know, your return may be randomly selected for review by the taxing authorities, especially given the increase in AI (artificial intelligence) generated notices that need to be responded to, and the new (OBDDA) tax law changes. Fees, associated with responding to notices, audit representation, and tax Identity theft not due to our error, are included in the Client Care Package’s nominal annual fee. All the information for the Client Care Package is provided with this letter.

If you choose not to participate in the Client Care Package Plan and you receive a notice for any reason (other than due to our error), questioning an item(s) on your return, selected for an audit, or had your tax identity stolen, you will be billed for these services that would have been otherwise covered by the Client Care Package Plan, at our hourly rate of \$300.

As provided in the Client Care Package details, participation in the program allows us to receive IRS/State letters and notices, questioning items on your return faster so we can address any issue before the IRS wants to audit your return and assess additional tax. Your final tax preparation invoice will include the fee for your selected level protection package depending on what is included on your return.

As an added benefit of being in our Client Care Package Plan, it also includes any work we must do regarding Tax Identity Theft in case your tax ID is stolen, which is rampant these days. There are also many additional benefits to you being in the Client Care Package Plan and is an inexpensive way to ensure we’ve got your back, no matter what. Think of it as your “peace of mind” protection plan.

Certified Tax Experts, Inc. Client Care Package Plan - Terms of Service “TOS”

The Certified Tax Experts, Inc. Client Care Package will provide audit defense services listed below for your 2025 1040 (or 1041) income tax return.

What Certain Terms Mean

"Audit" means any IRS or State formal review, examination, investigation, or verification of the information on your 2025 1040 (or 1041) income tax return.

"Notice" is any IRS or State communication, whether written, telephonic, or electronic, indicating that one of the income tax authorities is questioning an item on your return.

“Tax Identity Theft” is any IRS written communication indicating that the IRS cannot process your income tax return because one has already been filed in your name, unbeknownst to you.

Acceptance Date: the date from which your Client Care Package goes into effect.

Statute of Limitations is the term describing the period of time during which the IRS or State can Audit Your 2025 income tax return; for the IRS this is generally three years from the date of filing (typically four years for States), whichever is later.

The **Period of Coverage** begins on the Acceptance Date and ends with the expiration of the normal Statute of Limitations. (see above)

Refund/Rescission Period is the thirty (30) calendar day period commencing on the date of initial purchase during which you may cancel your Plan for a refund of your purchase price. Thereafter, your plan is irrevocably in force, and has been in force for thirty (30) days, during and after which you are entitled to audit protection services. After the Refund/Rescission Period the amount you paid for the Client Care Package is deemed fully earned by us and is non-refundable.

Items Needed refers to the information that we need from you to be able to assist or represent you in the event you receive a Notice and consists of: i) the IRS or State Notice; ii) a completed and signed IRS Form 2848 Power of Attorney and/or IRS Form 8821 Tax Information Authorization; iii) documents from you to support answers and positions.

CONFIDENTIALITY

As a Client Care Package participant, your name, address, and any other personal information will not be disclosed or sold to any persons or firms. Only our technical staff will have access to your tax information.

AUDIT PROTECTION AND REPRESENTATION BENEFITS

Our CPAs, IRS Enrolled Agents, Annual Filing Season Program (AFSP) practitioners, will professionally represent you in the rare case of an audit of your 2025 1040 (or 1041) income tax return filed for which you purchased a “Platinum” Client Care Package for (which automatically includes Audit Protection Plan), subject to you fulfilling your responsibilities as set forth below and the Audit Protection Plan Limitations and Exclusions described below. We will:

- a. Assign a tax professional/ team member to manage your case.
- b. Develop a strategy with you for responding to the Audit or Notice.
- c. Handle all communications, in any form, with the IRS or State regarding Your Audit or Notice.
- d. Negotiate with the IRS or State up to and including Appeals on your audit.
- e. Settle the audit with the IRS or State when we have your approval to do so.
- f. If the audit results in additional tax and penalties due, and you don’t have the resources to pay the obligation lump sum in full, we will inform you as to your strategies and procedural options going forward. However, additional fees shall apply if you want us to represent you in post-assessment (“collection”) matters.

CERTIFIED TAX EXPERTS, INC. CLIENT CARE PACKAGE LIMITATIONS

Your purchase of the Client Care Package which includes Audit Protection for the current tax filing period must be made before the date of any IRS or State Notice, specifically; the Notice must be dated after you’ve purchased the Client Care Package.

- We do not provide legal assistance, nor represent you in Federal or State Court, or Tax Court. Certified Tax Experts, Inc. is not a law firm and none of its partners, owners, or shareholders are attorneys.
- We do not provide legal assistance in defending issues of civil or criminal fraud.
- We will not reconcile checkbooks, organize records or do record keeping or bookkeeping.
- We will waive our hourly billing rates for up to 10 of audit representation. Additional hours will be billed at our regular rate of \$300.00 per hour.

CERTIFIED TAX EXPERTS, INC. CLIENT CARE PACKAGE EXCLUSIONS

Certain Audits, income tax return filings and associated issues of Audit will be **excluded** from the Client Care Package:

- **Pre-existing conditions** — If the date on the Notice is prior to the Date you signed up for coverage.
- **Large Businesses** — Business entities with gross receipts exceeding \$40 million and/or 10 partners/stockholders/beneficiaries/members.
- **Ownership interest in other tax entities** - If You have an ownership interest in a Corporation, Partnership, LLC, LLP, Trust, Estate, or Tax Shelter that has been contacted for an Audit and that entity is not a Client Care Package Plan participant.
- **Tax protestors** –The Client Care Package Plan excludes from the benefits of Membership anyone protesting the taxing of income on economic, political, religious, legal or constitutional grounds, or other frivolous claims.
- **IRS Criminal Investigation (CI)** – The Client Care Package Plan excludes from the benefits of Membership anyone currently under investigation by IRS CI. We will cease performing audit protection services on any Audit joined by CI and will exclude from the benefits of Membership any related Audit or Member until completion of the CI. We will resume providing audit protection services on the Audit, if possible.
- **Taxes Other Than Income Tax** - Your Client Care Package (which includes Audit defense) is limited to the type of income tax return that you signed up for. Payroll tax, sales tax, property tax, gross receipts tax, duty and local tax, excise, estate and gift tax and compliance audits of pension and profit-sharing plans are excluded from the Client Care and Audit Protection Plan package.
- **Collection Due Notices** — These are generated by the IRS or the State AFTER you've been assessed taxes as a result of an Audit or filing your income tax return without paying the balance due in full. IRS Collection or demand for payment notices are not covered under the Client Care Package Plan. These are considered Tax Resolution matters and will require a separate engagement agreement and a separate fee for us to represent you to solve the matter.

TERMINATIONS OF THE CERTIFIED TAX EXPERTS, INC. CLIENT CARE PACKAGE PLAN AGREEMENT

We reserve the right to terminate this Plan upon the breach of any material provision of this Agreement by the client, in the event that an Audit, Tax Return, Tax Identity Theft matter or issue of Audit meets the criteria of any of the "CERTIFIED TAX EXPERTS, INC. CLIENT CARE PACKAGE LIMITATIONS" and/or "CERTIFIED TAX EXPERTS, INC. CLIENT CARE PACKAGE EXCLUSIONS" listed above, or in the event that a condition renders the completion of our responsibilities under this Agreement unreasonably difficult to fulfill.

Conditions that can render completion of our responsibilities unreasonably difficult include, but are not limited to, your failure to reasonably fulfill your responsibilities per above, failure to cooperate during the course of the Audit process, or repeated use of abusive, inappropriate, or unprofessional language when communicating with us. This Plan shall also be deemed to be terminated if the Client Care Package fee has not been paid or has been refunded to the client.

RIGHT of RESCISSION (REFUND POLICY)

You have the right to rescind your Client Care Package Plan for the Refund/Rescission Period. Thereafter, Your Package/Plan fee is non-refundable.