

## TAX YEAR 2024 TMA TAX MAINTENANCE PROGRAM

Our clients routinely need us beyond just tax-filing, so we decided to create the TMA Tax Maintenance Program, which provides clients access to a wide array of tax planning benefits at a fixed-cost.

### Our TMA Tax Maintenance Program includes the following benefits:

1. **3 Phone consultations:** (30 minutes each) during the tax year\* (\$675 value)
2. **W-4 review:** ensures your paycheck withholding values are correct. (\$395 value)
3. **Correspondence/letters for mortgage lenders.** we will work with your lender to assist in any tax-related mortgage qualification needs.\*\* (\$195 value)
4. **Audit protection:** protection, in the event you are subject to an audit. This representation is provided to you at no additional cost to you for the current tax year.\*\*\* (\$2500 minimum)
5. **IRS notices and correspondence:** no longer deal with those pesky notices (\$395 minimum value)
6. **State, local, or city tax notices:** send it over and we'll determine the issue (\$395 minimum value)
7. **Collections representation\*\*\*\*** (\$1,500 value)
8. **Additional copies of your tax returns** (\$25 value)

**Cost for the 2024 TMA Tax Maintenance Program: \$125** (valued at over \$6000)

Speak to your tax consultant to enroll you in this program, or to learn more.

I accept the 2024 TMA Tax Maintenance Program:

Signature \_\_\_\_\_ Print Name \_\_\_\_\_ Date \_\_\_\_\_

I decline the 2024 TMA Tax Maintenance Program, and I am aware of the charges for additional services.

Signature \_\_\_\_\_ Print Name \_\_\_\_\_ Date \_\_\_\_\_

### Additional details:

- TMA Tax Maintenance Program applies to services that we provided, per tax year
- Blackout dates: 1/15 to 5/1, 9/1 to 10/15 and 12/15 to 12/31.
- \* Regarding the 3 phone consultations, calls will be with a Tax Associate. TMA Tax Maintenance Program does not apply for year-end tax planning consultations.
- \*\* Correspondence/letters for mortgage lenders does not include the preparation of any financial statements.
- \*\*\* Audit protection does not include audit appeals, reconsideration, tax court petitions, or any returns not prepared by The Model Accountant, LLC.
- \*\*\*\* Representation does not include liabilities greater than \$25,000, business liabilities, bank levies or liens, payroll tax, sales/use tax, or city tax.

