

Pel & Associates “Care Plan”

(optional)

The number of notices the IRS is sending out to taxpayers has increased in recent years. We have also noticed an increase in the number of clients that have contacted our office regarding IRS notices and letters they have received. Therefore, there is a much greater chance that you will have to engage in correspondence with the IRS.

Consider joining the Pel & Associates “Care Plan”
Cost = \$25 for one year

Benefits:

- Pel & Associates should receive a copy of the notice around the same time, and maybe even BEFORE, you receive your notice. In many cases we will have already prepared a response before we communicate with each other. This will help ensure a timely response to the IRS.
- In most cases, we will prepare the IRS response for free if we prepared the original return and you have elected to participate in the “Care Plan.” (Please note exceptions below). Without the “Care Plan,” responses that we prepare can range from \$50 - \$150.
- The “Care Plan” will also cover State inquiries, if we prepared the original return.

Exceptions:

- Audit Representation (Correspondence and In-Person Audits). An audit refers to a situation where you are required to prepare documentation (i.e. receipts) to prove expenses or income reported on a tax return. You may be asked to mail or fax information in, or you may need to set up an appointment with an IRS agent. As Enrolled Agents, we can represent you. However, this is beyond the scope of what is included in the “Care Plan.” If you are seeking audit representation, please call the office and we can arrange a fee based on the scope of the audit and the time required to represent you. We have been successful representing our clients before the Internal Revenue Service in the past and we are confident that we can be of great assistance to you.
- Amended Returns. If an amended return is required to resolve the situation, additional fees will be negotiated.
- Additional Meetings. If more than one in-person meeting is required to resolve the situation, additional fees will be negotiated.

HOW TO SIGN UP:

If you are interested in joining the Pel & Associates “Care Plan” for the 2022 tax year, please fill out and sign the IRS Form 8821. You may visit our website to obtain a copy at www.pelandassociates.com under “Care Plan,” visit the IRS website at www.irs.gov, or call our office at 714-526-2668 to have a copy sent to you. If you are filing a Married Filing Joint tax return, each spouse will need to fill out and sign a separate Form 8821.