

ROBERT HALL & ASSOCIATES

A Division of Montecito Financial Services, Inc.
300 West Glenoaks Boulevard, Suite 200
Glendale, CA 91202
(818) 242-4888

Tax Maintenance Program 2009 Tax Year

The program provides for the client to be able to have ready access to a tax professional under specific conditions. This will enable you to experience the least amount of tax liability at the end of the tax year, at a very reasonable price.

Our Tax Maintenance Program will include the following benefits to our clients:

1. Three phone consultations (15 minutes each) during the tax year scheduled through our appointment desk with any consultant **except Robert Hall and Stephen Hall.**
2. W-4 review to be sure your withholding is correct.
3. Correspondence/letters for mortgage lenders
4. Free Financial planning needs analysis
5. Audit protection in the event you are subject to an audit. Our audit representative will provide this service at **no additional expense** to you for the 2009 year. (However, audit protection does not include Schedule C, Schedule F, Field audits, Audit Appeals or TCMP audits.)
6. IRS notices and correspondence.
7. FTB notices and correspondence including Head of Household Audit Letter.
8. Notary Services- Five notarizations during the tax year scheduled through our appointment desk.
9. 1 additional copy of tax year 2009 income tax return.
10. Local business tax problems.
11. One free analysis of your primary home loan.

If you choose not to participate in this program, our billable rates will be as follows:

1. W-4 review - \$99.00
2. Letters for mortgage lenders- \$45.00
3. Financial Planning needs analysis- \$125.00
4. Audit Protection - \$695.00 (**except Schedule C, Schedule F, Field Audits, Audit Appeals and TCMP audits**).
5. Phone consultations - \$125.00
6. IRS notices and correspondence - \$69.00 - \$89.00 per correspondence
7. FTB notices and Head of Household audit letter - \$69.00 - \$89.00 per correspondence
8. Notary Services- \$10.00 per signature
9. Copy of tax return - \$25.00 per copy

The program fee is **only \$75.00** payable at the time of your tax preparation. The W-4 review and phone consultations are for the year during which the fee is paid. The audit fee is for the tax year prepared. The total savings for this program is **\$1,342.00 which is over a 94%** return on your investment.

Please ask your tax consultant to enroll you in this program.

Sincerely,
Robert Hall & Associates

1. I accept the Tax Maintenance Program

Signature

Print Name

Date

2. I decline the Tax Maintenance Program and I am aware of the charges for additional services.

Signature

Print Name

Date

Our Pleasure Comes from Serving You!