

**RH** ROBERT HALL  
& ASSOCIATES  
TAX CONSULTANTS

A Division of Montecito Financial Services, Inc.  
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**2020 Tax Maintenance Program**

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, Stephen Hall, Robert Wm. Hall, and E. Michael Watson.** Initial: \_\_\_\_\_
2. W-4 review to be sure your withholding is correct.
3. Correspondence/letters for mortgage lenders
4. Free Financial planning needs analysis Initial: \_\_\_\_\_
5. Audit protection in the event you are subject to an audit. This representation is provided at **no additional cost** to you for the 2020 tax year. **(Audit protection does not include Schedule C, Schedule F, Field audits, Audit Appeals or TCMP audits.) Purchase of TMP reduces audit costs from a minimum charge of \$5000 to \$2500**
6. IRS notices and correspondence.
7. FTB (including Head of Household audit letters), and Local city business tax notices. Initial: \_\_\_\_\_
8. Collections representation **(Representation does not include liabilities greater than \$25,000 or business liabilities.)**
9. Notary Services- Five notarizations during the tax year scheduled through our appointment desk.
10. 1 additional copy of tax year 2020 income tax return.
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 - \$195.00
2. Letters for mortgage lenders- \$45.00
3. Financial Planning needs analysis- \$125.00 Initial: \_\_\_\_\_
4. Audit Protection - \$2500.00 minimum charge  
**(except Schedule C, Schedule F, Field Audits, Audit Appeals and TCMP audits).**
5. Phone consultations - \$125.00
6. IRS, FTB, and local city tax notices and correspondence - \$69.00 - \$89.00 per correspondence Initial: \_\_\_\_\_
7. IRS and FTB Collection representation - \$750.00 **(except liabilities greater than \$25,000 or business liabilities)**
8. Notary Services- \$15.00 per signature
9. Copy of tax return - \$25.00 per copy

The program fee is **only \$85.00** 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. If all services are utilized, the total savings for this program is **\$4,179.00**. Please ask your tax consultant to enroll you in this program.

**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!**