



## **Peace of Mind Guarantee Fact Sheet**

In case of identity theft, we will handle the paperwork with the IRS and provide you with sound guidance along the way.

We will represent you in exams concerning tax returns and/or tax forms prepared by our firm, to the extent we are allowed by our professional designations. This includes tax notice correspondence from the IRS, the state and local taxing agencies. You will remain responsible for any additional tax, penalties and/or interest that may be assessed by taxing authorities.

Without this coverage you will be subject to our professional level hourly rates for responding to tax notices and audits.

In order to secure the Peace of Mind Guarantee, all you need to do is pay the surcharge protection fee included with our invoice for preparing your tax return.

### **Coverage Limitations:**

- Does not include taxpayer representation at the Appeals and Tax Court levels.
- Identity Theft Protection is limited to your identity being compromised with the IRS. Identity Theft Protection does not include monitoring your credit card, bank and other financial accounts or any other monitoring and preventive services commonly provided by protection companies such as LifeLock.