

# Welcome, Protection Plus Executive Member

As a Member of Protection Plus, you are not alone in the event of an IRS audit or a legal matter requiring professional assistance. If you receive an inquiry from the IRS or experience a legal matter, you are only a phone call away from receiving assistance from one of our experienced professionals. We will work directly with you and the IRS and/or other agencies and authorities in an effort to bring the matter to a resolution as quickly as possible.

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Preparation Guarantee is not available in SD, TN, WY and Puerto Rico. Tax Audit Assistance is available to members for 3 years on the tax return filed in conjunction with enrollment in this program and access to free & discounted legal services is available for one year after enrollment. The benefits and services outlined in the Certificate of Membership are subject to the terms, conditions, limitations and exclusions outlined in the Audit Assistance Membership Agreement and the Tax Reimbursement Program Terms and Conditions.

ness, intentional misrepresentation or fraud; state or local returns; returns that have become subject to IRS criminal investigations; IRS inquiries related to foreign income, flow-through entities (partnerships and S-corporations as reported on Schedule K), court awards and damages, bartering income, cancelled debt, estate and gift tax; IRS inquiries related to the following credits: Foreign tax credit, Plug-in electric vehicle credit, Residential energy efficient property credit, Mortgage interest credit, Credit to holders of tax credit bonds, Health coverage tax credit, "Credit" for prior year minimum tax, "Credit" for excess Social Security tax or railroad retirement tax withheld; and IRS inquiries and audits related to the Affordable Care Act. The Tax

**Program Conditions and Exclusions:**  
The following types of tax returns and or IRS inquiries are specifically excluded. Company is under no obligation to provide a member with assistance in connection with non-resident federal returns; amended returns; returns other than individual 1040 returns including, but not limited to, corporate, partnership, trust, estate, gift and employment returns; returns in which the taxpayer or tax preparer had knowledge of additional taxes owed as of the date taxpayer enrolled in this program; returns prepared with gross negligence, recklessness-



## EXCLUSIVE MEMBERSHIP

IRS Audit Assistance & Free and Discount Legal Services

CERTIFICATE OF MEMBERSHIP ENCLOSED

# Certificate Of Membership

This Certificate entitles any actively enrolled member of Protection Plus Audit Assistance for whom Protection Plus has received a membership fee to the following benefits and services:

## Access to Experienced Tax Professionals

Members are provided access to our experienced tax professionals who assist with evaluating and explaining IRS inquiries and audits; providing consultation and advice; and helping to draft responses to the IRS. Our tax professionals will work directly with the Member and the IRS in an effort to bring the matter to a resolution as quickly as possible. Assistance is provided for individual federal tax returns form 1040 (including schedule A, C and E).

## IRS Identity Theft Assistance

Protection Plus will assist members who experience problems in filing their tax return due to a suspected identity theft incident by interacting with the IRS on the taxpayer's behalf. We will assist in completing all required paperwork to be submitted to the IRS and getting their tax return successfully filed. We also assist in obtaining an IRS Identity Protection PIN to prevent a future event.

## Tax Credit and Taxpayer ID Assistance

Protection Plus works to get denied credits such as Earned Income Credits, Child Tax Credits, and Education Credits funded and we provide assistance in obtaining an individual taxpayer identification number for taxpayers not eligible to get a social security number.

## Tax Preparation Guarantee

Members can rest easily knowing that participating tax preparers' services are guaranteed. If a legitimate preparer error is made during the filing of a tax return, you will be reimbursed for the consequent additional amounts due the IRS up to \$2,500. (Not available in SD, TN, WY and Puerto Rico)

## Tax Debt Relief

Protection Plus assists taxpayers who owe tax debts to the IRS. When additional taxes, penalties, and interest are assessed, our experienced tax professionals will work with the member to identify the available alternatives to pay these added amounts and resolve any resulting debt owed to the IRS.

**Tax Audit Assistance is available on the Member's tax return for a full 3 years!**

## Free & Discounted Legal Services

Protection Plus members have access to a nationwide network of over 20,000 plan attorneys through Legal Club of America. These attorneys have been contracted to provide you with many free and discounted legal services. When a need arises, you will be referred to a plan attorney that speaks your language, practices the area of law required and is conveniently located. You will receive access to this benefit for up to one year following your date of enrollment.

## Discounted Legal Services:

Discount Legal Services include traffic ticket defense, name change, simple will with minor's trust, non-support (spouse/child), simple divorce, regular incorporation, and personal real estate closing. Plan attorneys will either charge \$125.00 per hour, or when appropriate, give members up to a 40% discount of off their usual and customary hourly rate, whichever is greater.

## Free Legal Services Include:

- Initial phone consultation for each new legal matter
- Initial face-to-face consultation for each new legal matter
- Review of independent legal documents
- Plan attorneys will prepare a free simple will for you and your family, as well as update the will annually for free
- A state specific, web based, free living will form is available to members
- Plan attorneys will help members represent themselves in small claims court
- Assistance in solving problems with government programs, such as INS and welfare
- When deemed appropriate by your plan attorney, he or she will write initial letters on your behalf (one letter per legal matter)

In many states, attorney liability may require plan attorneys to obtain a retainer from the member prior to providing some of the free member benefits.



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**ProtectionPlus**  
Audit Assistance

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