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Alley & Bradl, LLC Client Care Plan Option

It is important to us that you have more of the valuable peace of mind that led you to engage our services in the first place. To that end, we have developed our Client Care Plan to handle any letters from the IRS, the state department of taxation and any city income tax department.

No matter why you may have received the letter, all you need to do is send it to us. We will take it from there. We may require you to sign a Form 2848 or state representation form to allow us to speak directly to the tax department regarding your account.

Your Client Care Plan fee is 25% of your tax preparation invoice and is due and payable at completion of the return. The service will be added to your invoice and will begin when the invoice has been paid. The service will remain in place for your 2023 returns for as long as you are a client of Alley & Bradl, LLC.

It is your responsibility to bring to our office any correspondence from a tax collecting agency within 30 days of receipt of the initial notice.

Client Care Plans are sold on an annual basis. The purchase of one plan does not include previous or future tax years. Enrolling in a plan does not guarantee successful resolution of your tax issues nor does it guarantee results of any kind. Furthermore, Alley & Bradl, LLC do not assume any responsibility for issues or potential liabilities you may have with taxing agencies that are not the fault of Alley & Bradl, LLC. You are responsible for any additional tax due when notices are resolved. The Alley & Bradl, LLC Client Care Plan does not cover audits. Please contact us if you have any questions about this service.

Yes, please enroll me in the Alley & Bradl, LLC Client Care Plan for my 2023 tax returns. I understand that I will be charged an additional 25% for this service.

Signature

Date

This service is optional.