



Round the Year HELP/SUPPORT plan

What is the “Annual Tax Advise Retainer” Program?

ATAR is a Round the Year Help & Support plan for tax matters available to you at a deeply discounted rate at the time of filing your taxes.

All through the year there are numerous reasons why you may need to call us to discuss Tax matters. It may be a notice you received, or you are making some financial decisions and want to understand the Tax implications or maybe you just want to proactively plan for your taxes. This program allows you to call your Tax Advisor without having to think twice about consultation fees.

It is important that you sign up for this service at the time of filing your tax returns. The program costs **\$25** per year. You cannot sign up for this program later. Without the retainer our Tax consultancy fee is \$125/hr.

Please note this program covers free of charge queries like: Questions on filing W4 form, Tax impact with change in income and expenses, Tax implications with changes in your status, Marriage, Divorce, Children etc, Clarifications on Federal or State Taxes, Questions on your tax returns etc. Answers to simple questions on IRS notices are also included.

However, IRS / State notice or Tax amendments that require us to prepare your response are not included in this plan. But as a benefit of the retainer program, you will receive a 33% discount on our hourly rate and FBAR (Foreign Bank Assets Reporting) filing.

Services not included with retainer ship:

- IRS/ State Notice and IRS/State Audit matters
- Estimated tax calculation.
- Amended tax return
- Financial Palnning

How does the program work?

At the time of filing your taxes we will ask you if you want to sign up for the Annual Retainer. If we forget, Ask Us!

Once you are signed up, we will give you a Retainer Number. You will need to specify this number in your communication with us for faster service.

Anytime during the year, when you have a question, email us, it is our preferred choice of communication. We will call you back or write back to you. Of course you are free to call, but off season, email is very effective. Our responses are pretty quick. Please remember to include your Retainer # in the subject line.



ANNUAL TAX ADVISE RETAINER AGREEMENT

RetainerShip Number	
Client Name	
Client SSN	

Scope of Service: Any five questions but not related to below:

Services not included with retainership:

- IRS/ State Notice and IRS/State Audit matters
- Estimated tax calculation
- Amended tax return
- Financial Planning

Duration:

From the day you sign the agreement till 31st Dec of that year

Process:

Once you are signed up, we will give you a Retainer Number. You will need to specify this number in your communication with us for faster service.

Anytime during the year, when you have a question, email us, it is our preferred choice of communication. We will call you back or write back to you. Of course you are free to call, but off season, email is very effective. Our responses are pretty quick. Please remember to include your Retainer # in the subject line.

We will get in touch with you within 24 hours. You always have to refer your retainer ship number in your Email subject, to identify you as retainer subscriber. If you do not write your retainer ship number, the email will go as unread and will not be responded.

Fees: \$25/- per annum

Thanking you,

Workmytaxes Inc