TAX SERVICE GUIDE

CONCERN: EAP has partnered with CLC Incorporated to provide Tax Preparation services. The tax preparation service is telephonic with all material sent by mail or fax. The following information is a guide for the fees that will be charged for tax preparation for the tax year 2016. The fees will be based on the preparation of the Federal return and includes the State return, if required. No additional discount is available if the state return is not needed.

**Tax Preparation Fees**

<table>
<thead>
<tr>
<th>Description</th>
<th>Fee</th>
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<tbody>
<tr>
<td>Basic return includes one (1) 1040 Federal return and one (1) State return</td>
<td>$260.00**</td>
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<tr>
<td>25% discount</td>
<td>-65.00</td>
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<tr>
<td>Net Tax Preparation Fee</td>
<td>$195.00**</td>
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**Additional fees:**

- **E-Filing fee:** $20.00
- **Additional State Return(s):** $65.00 each
- **Charge for each additional schedule**: $65.00 (Unless major work is required)
- **Charge of services (such as booking or complex calculations):** $195.00 per hour

- **A client that is interested in CLC’s tax preparation service will first be required to provide the preparer with a copy of their prior year return.**
- The client will then be sent a “Tax Organizer” to complete; the Tax Organizer will assist in collecting and reporting information to properly prepare the tax return.
- Along with the Tax Organizer, the client will receive a billing information sheet requesting a Visa or MasterCard number.
- Upon receipt of the completed tax organizer, including All W2’s and All 1099’s, CLC will contact the client to clarify responses and verify the cost, the credit card will not be charged until the tax preparation fee has been confirmed with the client.
- **CLC does not prepare delinquent taxes.**
- If the person is interested in tax filing for a business, trust, or estate, or has a more involved personal tax return requiring substantial amount of additional preparation time, those requests will be accommodated on an individual basis and subject to a charge of $195.00 per hour ($260.00 minus a 25% discount).
- **Any tax issue related request requiring research time over and above the “no cost” time provided through the benefit, will also be accommodated on an individual basis and subject to hourly charges of $195.00 per hour ($260.00 minus a 25% discount).**

It is important that CLC receive the tax organizer with W-2 or 1099 forms by Tuesday, March 14, 2017. This will allow them time to prepare the taxes and mail them back for signing. If they do not receive the tax organizer by this date, they cannot guarantee that the tax filing will be completed in a timely fashion. The client may then have to file an extension. **To get started, call CONCERN at (800) 344-4222 and ask for a financial referral to the Tax Coordinator.**

** Individual 1040 Federal tax return preparation fee includes Schedule A, Itemized Deductions and Schedule B, Interest Income, if applicable. Tax preparation fee also includes shipping completed returns to the client via 2-day express service.
Dear Client:

CLC Inc. would like to extend its appreciation for allowing us the opportunity to serve you. It is our mission to provide you with the highest level of professional tax preparation at a very competitive price.

You may have some concern about the confidentiality of the information you provide to our office. Rest assured, the Federal Trade Commission has issued regulations that require tax preparation firms to adhere to a strict privacy procedure. Your personal information will only be shared with employees who are directly involved in the tax preparation process of your return. Furthermore, your personal information will never be disclosed to any outside source who is not directly involved with the preparation process without your written permission. However, you should be aware that anything you tell us for the preparation of your tax return is considered confidential but is not protected from Federal or State taxing agencies. Your tax forms will be prepared under the guidelines established by the Internal Revenue Service. The tax preparation procedure was designed to meet the IRS due diligence requirements. However, neither CLC Inc., its’ employees or assignees accept any responsibility for the validity of the information submitted by the taxpayer. Under (USC 7602(1), it is the responsibility of the taxpayer to provide the most accurate information to their ability. Furthermore, all submitted information must be substantiated if requested.

Once your tax professional has received all the necessary information and required supporting documents, your return will be immediately processed. You will be notified once your return has been completed and has passed a final quality review. We encourage all clients to review their completed forms for thoroughness and accuracy prior to IRS submission.

Respectfully yours,

CLC Inc.