

TAX HELP LINE

Members of the Tax Help Line will have access to unlimited tax advice, prior year tax return review and free tax return preparation for forms 1040 EZ, 1040A and standard 1040. Tax Help Line provides members with access to discounts on numerous tax return schedules and forms. Simply call the toll-free number and members will be able to effectively plan in advance so the year-end tax preparation is free and painless.

HIGHLIGHTS

- Unlimited advice on federal taxation
- Free tax return preparation for forms 1040 EZ, 1040A and standard 1040
- Deep discounts on numerous other tax schedules
- IRS audit assistance, Tax planning
- Review of prior year's tax return
- Member portal with tax tips, tax law changes, member advice and much more

TAX HELP LINE FAQ

Q. What does the Tax Help Line do?

A. Tax Help Line offers members access to unlimited tax advice, prior year tax return reviews, and free tax return preparation for forms 1040 A, 1040 EZ and the standard 1040. In addition, Tax Help Line provides members with access to discounts on numerous tax return schedules and forms. By using a toll-free number during normal business hours, members will be able to effectively plan in advance so the year-end tax preparation is free and painless.

Q. Who is behind the Tax Help Line?

A. All tax and financial assistance is provided by tax attorneys, financial analysts, CPAs, former auditors and/or Enrolled Agents certified by the IRS. This team of professionals is ready to answer tax questions in a confidential and secure environment.

Q. What guarantee do members have that the tax returns will be accurate?

A. All tax and financial advice is backed by a \$1 million liability policy.

Q. Why would a member who uses tax preparation software to file taxes need the Tax Help Line?

A. With today's tax software programs, users need more than help screens. Offering live, one-on-one direct answers to members' tax questions over the phone, the Tax Help Line steps in with tax advice tailored specifically to a member's unique situation.

Q. How would the Tax Help Line assist members in the event of an audit?

A. Tax Help Line will review any notice or letter issued by the IRS and provide professional advice on how to understand and solve the matter. Tax Help Line experts assist and advise members who get audited by reviewing the IRS audit notification and helping sort out the facts.

Q. What sort of questions do members ask?

A. Members may ask questions covering any aspect of U.S. tax law, such as:

- Should I open a ROTH IRA?
- How does the capital gain tax work?
- Is the money I inherited taxable?
- Which tax form do I file?
- Is my Social Security or retirement taxable?
- Do I get a break for child care expenses?
- Should I itemize deductions?
- Which deductions can I take if I have a home-based business?