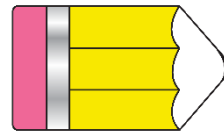


## Fleming Tax Olympic Membership



Fleming Tax is happy to announce an additional service for our clients. For some clients we have our Business Advisory Service plans which are very comprehensive yet might contain some services that not everyone needs such as salary optimization, payroll processing, multiple tax planning events, among other things.

For some others we have a transactional relationship where clients come in each spring for tax return preparation, and that's all they need. No big questions. No tax planning. Just a pile of tax documents and a few discussions later and **boom** they have a tax return and a nice summer.

Is there an in-between? Why Yes, there is!

Olympic Membership is a wonderful tax service for those who don't need all the business advisory bells and whistles, but from time to time want some love from an experienced tax consultant and business advisor. Have a quick tax question? Need to know the depreciation rules as you buy that new car? Thinking about selling a rental and want to know how much it will hurt? Wondering what your April tax bill is going to be in August? Olympic Membership is like roadside assistance... you might not use it, but you sleep better knowing you have it.

We offer three levels of the podium aptly labeled Bronze, Silver and Gold. However, each of these can be customized to fit your unique needs.

Olympic Membership is specifically designed to give you the freedom to call, text or email us without the worry of being nicked and dimed. And! We also offer a tax planning event where we gather up your financial records like paystubs, rental activities, stock sales, etc. and we create a mock tax return projecting your annual income and eventual tax obligations. We are not big on surprises... bad news in August or November is palatable, yet bad news on April 15 is not fun!

You come to us for our tax knowledge, expertise, tax planning and the ability to put all those crazy documents together to help you comply and stay legal! All we have to sell is our time and our knowledge. Over the last few years, we have been either giving away our knowledge for free or charging for small tasks where the paperwork and recordkeeping on that was crazy! As a result, we have come up with the tiered membership pricing to make sure that we give you the time and attention that you find best suited to you and we don't need to nickel and dime...It's good for all of us!

# Olympic Podium of Services

Service	Bronze	Silver	Gold	Hourly Fee	A la Carte
Individual Tax Return Prep	X	X	X		Starting at \$425****
Additional Copies of Returns		X	X		\$25 per Copy after Filing
IRS Correspondence*		X	X	\$150	\$150/Hour (1 Hour Minimum)
Audit Defense**		½	X	\$300	\$300/Hour Silver Package \$150/Hour
Tax Planning Service***			X	\$250	\$250/Hour (1 Hour Minimum)
Estimated Tax Payment Calculations	X	X	X		Included
“Quick Chat’s”		X	X	\$150	\$150/Hour (1 Hour Minimum)
Price of Plan	\$0	\$80	\$250		
Projected Value		\$2,250	\$4,250		\$2,250 \$4,250

\*Fleming Tax Will Respond to letters from the IRS and OTC for the year purchased. (10 Hour Max)

\*\*Covers up to 40 hours of Audit Representation at full price for Gold Package, ½ price for Silver

\*\*\*This package offers tax planning services and up to semiannual review of financial information.

\*\*\*\*Fees are based per form: See [flemingtax.com/pricing/](http://flemingtax.com/pricing/) for more info.

## Fine Print

With our Olympic Membership, we can provide basic tax advice through complimentary quick chats. We also include up to two annual tax planning events. However, we cannot provide consultation where we assist you in making a decision based on our recommendation. Additionally, the following activities are considered out of scope and might incur a separate fee-

- handling IRS or state notices for matters that Fleming was not originally engaged to perform,
- verification letters for mortgage loans,
- postage and delivery beyond simple letters,
- financial planning or investment advice, (We have Allies to recommend)
- legal stuff: annual corporate governance such as filings, resolutions and meetings, reviewing legal documents such as Operating Agreements, Shareholder Agreements, contracts, etc., (We have Allies to recommend)
- QuickBooks or other accounting software setup or training,
- extensive coordination with attorneys and financial advisors,

If we believe the requested service is outside of scope and not included in the Olympic Membership Services, we will have that awkward conversation with you ahead of time so an agreement can be reached. We will never do work and then bill you without an estimate of time from us and approval from you.