

# PeoplesChoice<sup>®</sup>

Tax Advice & Preparation Program

**A**s a member of the PeoplesChoice tax program, you will have access to unlimited tax advice, prior year tax return review and free tax return preparation. **That's right!** A qualified tax professional will prepare your taxes for **FREE!** Free tax preparation includes 1040 EZ, 1040 A and the standard 1040.

In addition, the PeoplesChoice tax program provides members with access to discounts on numerous tax return schedules and forms.

By using our toll free number during normal business hours, you will be able to effectively plan in advance so that your year-end tax preparation is free and painless.

Proper tax planning could:

1. **Limit your potential tax liability**
2. **Increase your potential tax return**
3. **Could lessen the possibility of an audit**



## OUR SERVICE:

PeoplesChoice members receive all this:

- ◆ Unlimited advice on federal taxation via toll-free phone call/fax/e-mail
- ◆ Free tax return preparation (includes 1040EZ, 1040A, and 1040)
- ◆ Deep discounts on numerous tax schedules
- ◆ Unlimited advice on federal taxation for small business owners (sole proprietors)
- ◆ IRS audit assistance
- ◆ IRS notification assistance
- ◆ Tax planning
- ◆ Review of prior year's tax return
- ◆ Member portal with:
  - tax tips
  - tax law changes
  - tax organization area
  - IRS audit area
  - IRS notification area
  - member advice on-line

USE PeoplesChoice

AS THE VOICE  
**BEHIND**  
THE SOFTWARE.

**W**ith today's tax software programs, users need more than help screens. PeoplesChoice steps in with tax advice tailored specifically to an individual's unique situation. Live, one-on-one, direct answers to members' tax questions over the phone. When pop-up screens just aren't popping up with the right answer, PeoplesChoice experts are a phone call away with reliable advice.



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

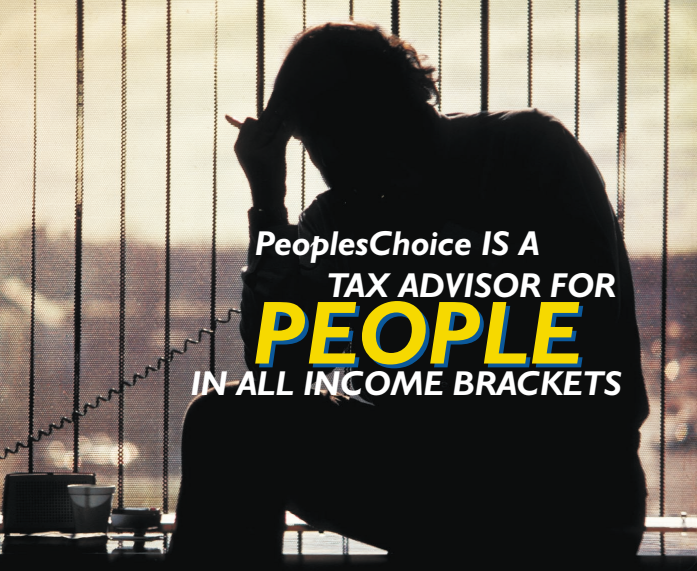
Additionally, all tax and financial advice is backed by a **\$1 million** liability policy!

Our team of professionals will also review a member's prior year's tax return. This review can reveal costly errors and generate a source of extra tax savings.

*Typical Questions*

Some of the typical questions our PeoplesChoice experts hear are:

- Should I open a Roth IRA?
- How does the capital gains 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 tax break for child care expenses?
- Should I itemize deductions?
- Which deductions can I take if I have a home-based business?



PeoplesChoice IS A  
TAX ADVISOR FOR  
**PEOPLE**  
IN ALL INCOME BRACKETS

According to Thomas J. Stanley in his book *The Millionaire Mind*, "The number one activity for millionaires is consulting with a tax expert." For most of us, tax consultation isn't that high on our list of things to do, but it's still vitally important for nearly everyone at one time or another. PeoplesChoice members seek and receive advice on the tax implications of all these everyday financial matters:

- ◆ Individual Retirement Accounts, Roth IRAs, 401k plans, SEPs
- ◆ Healthcare spending accounts
- ◆ Investment timing and strategies
- ◆ Capital gains
- ◆ Real estate timing and strategies
- ◆ The tax advantages of home ownership
- ◆ Divorce
- ◆ Inheritance
- ◆ Retirement planning
- ◆ And much, much more

USE PeoplesChoice  
AS AN  
**INTERPRETER**  
OF IRS SPEAK.

PeoplesChoice will review any notice or letter issued by the IRS and provide professional advice on how to understand and solve the matter. PeoplesChoice experts assist and advise members who get audited. They review the IRS audit notification and help sort out the facts. Members also have access to a web-based IRS audit tutorial, as well as an IRS notification tutorial that helps take the terror out of those ominous-looking IRS letters

To reach a Tax Professional  
during the hours of  
10am-6pm EST call:

**866-544-4399**

PeoplesChoice®  
Tax Advice & Preparation Program

All tax related services are provided by Tax Rite®, Inc.

PeoplesChoice®

Tax Advice & Preparation Program

PLEASE PAY

**PERSONAL  
TAX ADVICE  
IN AN  
IMPERSONAL  
WORLD**

19b Employee's address and ZIP code

20 21

24 State income tax 25 State wages, tips, etc.

Copy A For Social Security Administration

Form **W-2 Wage and Tax S**

For Paperwork Reduction Act Notice and instruc

STATEMENT DATE

\$

AMOUNT ENCLOSED

ACCOUNT NUMBER

ACCOUNT NAME

STATEMENT DUE

ACCOUNT NUMBER

PLEASE DETACH AND  
RETURN THIS PORTION  
WITH YOUR PAYMENT

CHECK ITEMS  
BEING PAID.