



Advantage Plus Plan Agreement

This is an engagement agreement between Clergy Advantage, Inc., hereinafter referred to as Clergy Advantage® and the person listed below for the **Advantage Plus Plan** annual subscription. This agreement takes effect on the signed date of this document and automatically renews annually on the anniversary of the signing date until Clergy Advantage® receives written notice of termination or Clergy Advantage® withdraws at their discretion.

Name:		
Mailing Address:		
City:	State:	Zip:
Daytime Phone:	Cell Phone:	
Email:		

1. **Advantage Plus Plan** Services include:

- ✦ Review of Client’s prior year’s Individual tax returns.
- ✦ An Amendment of the reviewed year’s Individual returns if we deem it necessary.
- ✦ Review of Client’s current year’s Housing Allowance arrangement.
- ✦ Preparation of one Individual Federal and State tax return(s) (if required).
- ✦ Electronic filing and extension preparation and filing upon written Request, if required.
- ✦ Consultation with a partnering Financial Advisor specializing in retirement investment strategies for ministry professionals.
- ✦ Two hours of your Tax Advisor’s time to respond to phone calls and emails during the year, tax planning issues and opportunities for the current year (maximum of two hours). **Note: Consultations are not scheduled during active tax season (February through April).*
- ✦ Review and response to Letters and Notices from Tax Authorities.
- ✦ Access to all proprietary financial and tax planning webinars/resources offered by Clergy Advantage®.
- ✦ Clergy Advantage® Newsletter and Tax-Tips and Updates.

2. **Fee** – The Clergy Advantage® fee for client’s one-year subscription to the **Advantage Plus Plan is \$59 per month** for Client’s with a typical tax return filing. Clergy Advantage® reserves the right to define a non-typical tax return including; returns having Non-Minister Schedule C businesses, Partnerships, S Corporations, numerous Stock Transactions, Rental Properties, Multiple State returns required and any other non-typical reporting requirements. For more details about particular situations consult with an advisor.

3. **Exclusions** – Audit representation for audits by Internal Revenue Service or State tax authorities.



Terms of the Plan Agreement:

1. I agree to provide all required information (CLERGY ADVANTAGE® Tax Organizer, either paper or electronic version, with supporting documentation) necessary to complete my tax return(s). This includes all items of income subject to income tax.
2. I understand and accept the CLERGY ADVANTAGE® policy that tax preparation work will not begin until I submit my signed **Engagement Agreement** and ACH form.
3. I agree to retain all the documents, receipts, canceled checks and records required to substantiate the items of income and expense reported on your return(s) for 5 years.
4. If I receive any letters or notices from the IRS or state taxing authorities, I will immediately send a copy to CLERGY ADVANTAGE®.
5. I understand that CLERGY ADVANTAGE® will use professional judgment in resolving any discrepancies regarding the interpretation of tax law, and conflicting opinions between the tax authorities' interpretation and other supportable positions,
6. CLERGY ADVANTAGE® will not audit or otherwise verify any information. However, CLERGY ADVANTAGE® may require clarification or additional information before filing.
7. CLERGY ADVANTAGE® is not responsible for disallowed deductions or the inclusion of additional unreported income or any resulting taxes, interest and/or penalties assessed.
8. In the event of preparer error, CLERGY ADVANTAGE® is responsible for any penalty assessed due to such error. I agree to be responsible for additional tax and interest that may be assessed.
9. CLERGY ADVANTAGE® will not file any Federal, State or local Tax Extensions without Client's specific written request to do so.
10. This subscription automatically renews annually on the date of its inception. Cancellation of this agreement must be done in writing two weeks before the renewal date. A cancellation fee may apply if time or services have been rendered by CLERGY ADVANTAGE® on your behalf during the calendar year of the active subscription.
11. CLERGY ADVANTAGE® reserves the right to withdraw from this engagement. Withdrawal can occur for, but is not limited to; failure to provide information in a timely manner, refusal to comply with reasonable requests or misrepresentation of any facts, or failure to make payments in a timely manner. Withdrawal will release CLERGY ADVANTAGE® from any obligation to complete any service and will constitute completion of our agreement.

Client's dated signature below constitutes full acceptance of all terms and conditions specified in this document.

This agreement can be returned to Clergy Advantage® by mail (2093 East 11th St., Suite. 200, Loveland, CO 80537), fax (970-663-4950), or e-mail (Organizer@ClergySupport.com).

By: _____ Date: _____
(Client's Signature) NOTE: Only one client signature is required



ACH/Credit Card Payment Authorization Form – ADVANTAGE + PLUS PLAN

Mailing address

Billing address if different

Name:	Name:
Address:	Address:
City/State/Zip:	City/State/Zip:

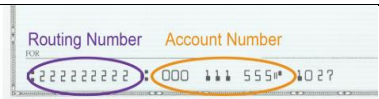
Credit / Debit Card

Type of Card	<input type="checkbox"/> Visa/MC <input type="checkbox"/> Discover <input type="checkbox"/> Amex				
Account Number					
Expiration	Month (xx):		Year (xxxx):		Security Code:

ACH - Bank Account

Checking **Savings**

Banking Institution Name	
Account Number	
Bank Routing Number	
Bank City/State	
Bank Phone Number	



I hereby authorize Clergy Advantage, Inc. to charge my credit card account or draw drafts of ACH debits as follows for the plan detailed on my signed agreement:

Amount Per Month:	\$	59.00
Requested day of month for payment (by client):		<input type="checkbox"/> <i>No Preference</i>

I agree to the following:

1. Clergy Advantage® shall incur no liability for bank fees if the balance in the account is insufficient to cover the ACH or credit card payment or if variances in bank processing dates occur due to weekends or holidays.
2. Charges declined by the credit card company must be immediately resolved before the next processing date.
3. Clergy Advantage® charges declined by the financial institution may constitute grounds for cancellation of service.
4. I will notify Clergy Advantage® of changes in credit card or bank account (compromised card, new expiration, new bank account, etc.).
5. This agreement will remain in effect and will automatically renew annually until canceled in writing by either party.

Authorized Signature:

Date: _____