Clergy*advantage*® is pleased to offer our Individual Tax Clients

The Premium Support Package

Your 12 month subscription covers all of the services listed below. The fee is fully tax deductible for State and Federal Income Tax and Ministry Social Security Tax.
This service is designed for Individual subscribers; call for information about group packages.
Tax Preparation is NOT included. *(See reverse side for a detailed description of services.)*

2 Hours of Consultation with your Tax Advisor
Routine (”quick questions”) about your taxes and finances via e-mail, telephone or in person.

1 Hour with our Financial Planner
Coordinating and customizing a tax-advantaged strategy to attain your goals.

Revised Pay Package Structuring and Tax Planning
Yearly review to optimize your salary and benefits. This alone can net you thousands of dollars over the course of your ministry.

Revised Estimated Tax Projections
Revised during the year as needed for pay package changes due to a call to a new church, spouse job change, unexpected bonuses, etc.

IRS Correspondence
Review of IRS and State letters and notices; draft initial response to IRS and State.

Audit Representation
Includes pre-audit work, documentation, and audit representation before the IRS, applies only to returns we have prepared. Available only if your current subscription is in force at time of receipt of your audit notice.

Free Webinars
Any webinars offered (normally $99) will be free for your subscription.

The Premium Support Package Services, if priced separately, are valued at over $1800.

Your cost is only **$ 389** (Tax Preparation is not included)

Subscribe by contacting us by email, phone, or fax! All credit cards accepted! Accounting@ClergySupport.com -
Provide name, address, card number and expiration date. (For added security, phone or fax information.)

Clergy*advantage*®

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The Premium Support Package (PSP) is designed to afford our tax preparation clients an extra measure of service. We ask that you plan ahead to schedule time with your Tax Advisor before or after tax season (February through May) whenever possible.

Q. What is the difference between tax preparation and tax planning?

A. Every day we work with clients to structure housing allowance and pay packages, reallocate retirement contributions, medical reimbursement accounts, Rabbi Trusts, decide when to begin Social Security retirement benefits, consider a 1031 exchange, and find the best time to incur certain housing expenditures. This is tax *planning.* These steps will save *many thousands of* dollars for our clients. To wait until next February's tax appointments will be too late. Your options are often significantly reduced the closer we get to the tax deadlines.

Q. Why do I need the Premium Support Package?

A. The **PSP** allows you to contact us for advice about tax and financial issues without incurring hourly fees. Life is unpredictable and we want you to have the full benefit of our expertise as these changes occur. It also encourages you to plan ahead and be proactive, rather than waiting until tax preparation time to discover what steps you should have taken earlier.

These are some of typical Issues that the PSP covers:

- Tax efficient planning & strategies
- Year-end tax issues such as; ministry expenses, investment issues
- Pay package structuring
- Revised tax projections for pay raises, family and job changes
- Planning for Mutual fund or stock sales
- Unexpected income, Inheritance, gifts, bonuses, etc.
- Questions about Housing Allowance, Purchases & Leases
- Review of any IRS notices you may receive
- Audit Protection

Q. Why don't you include consultations with tax preparation?

A. Actually, we do. This is the time that your Tax Advisor reviews your return with you. First year tax clients generally require a discovery before their taxes are prepared, as well. Your yearly tax return review is rarely enough time to fully plan and certainly is too late to let us know about changes in your situation that will affect your taxes. The person who prepares your tax return receives reasonable compensation for their expertise. However, they simply cannot afford to spend the rest of the year receiving unlimited phone calls and correspondence without additional compensation. (We offer "year-round service." Some have misinterpreted that to mean year-round ***free*** service.)

Q. You have sometimes answered mid-year questions at no charge. Isn't that included in our Tax preparation fee?

A. We have earned a national reputation for knowing the answers to all clergy tax issues. As a result, we get more "quick" questions than we can handle. The joke around our office is that "the question may be quick but the answers are not." One question leads to another and the tax laws are complex with numerous exceptions to every rule. ***If we do not give each issue the time and expertise it deserves, we are doing YOU a disservice. In order to give true professional answers, we simply cannot try to give quick free answers.***

Q. What types of questions are not included?

A. The goal of the **PSP** is to offer greater tax planning opportunities and peace of mind. We consider "routine questions" as anything that we can answer in about 15 minutes or less. "Project" questions require 1–20 hours of our time and are not included in this **PSP**. Some examples of "project" questions are opinion letters to church boards, tax planning for the sale of a business, structuring the sale of a church parsonage to the minister, determining ways that the church can help the minister purchase a home, or negotiating IRS collection solutions, (Offers in Compromise, Installment Agreements, Garnishments, Levies).