



1751 S. Naperville Road, Suite 102, Wheaton, Illinois, 60189-5896
630-668-3030 P 630-668-2757 F www.defilippisfinancial.com
TAX RELATED EMAIL: steve@defilippisfinancial.com INVESTMENT RELATED EMAIL: stephen.defilippis@ceterafs.com

Stephen W. DeFilippis, EA, Financial Adviser
Licensed to Represent Taxpayers Before the IRS

Member: Illinois Society of Enrolled Agents
National Association of Enrolled Agents

PREPAID AUDIT SERVICE

Did you know that the IRS has resumed its **random audit program**? If the new program is similar to earlier IRS random audits, it promises to be especially grueling. National experts estimate that it will cost a taxpayer between \$500 and \$3,500 to hire an expert to provide representation on a random audit. This fact and the increased sophistication of the IRS and Illinois Department of Revenue (IDOR) computers make it increasingly likely that you will receive a proposed tax adjustment or notification of audit. As a result, **DeFilippis Financial Group®** offers our Prepaid Audit Service.

This service, if purchased, entitles you to audit representation by Stephen W. DeFilippis, EA should the IRS or IDOR audit you. If you choose not to take advantage of our Prepaid Audit Service, or if you do not qualify, you may retain our services at our standard hourly rate. Fees for complex audits can reach several thousand dollars. Our Prepaid Audit Service is designed to offer you top quality representation services for maximum value.

HOW DOES THE PREPAID AUDIT SERVICE WORK?

If you purchase our Prepaid Audit Service, a fee of 25% of your tax return preparation cost will be added to your bill. Your election to purchase this service may only be made at the time of your tax return preparation interview. You cannot decide to buy this service later.

This fee will cover all representation work done by us on your behalf for your _____ calendar year tax return. This service **will not cover audit representation services for any other tax year**. For purposes of this service, the term audit includes office audits **and** correspondence audits.

This service specifically covers your representation by Stephen W. DeFilippis, EA before the IRS and/or your state taxing authority. It does not cover any additional tax, penalties or interest you may incur as a result of the audit. It does not cover fees for preparing amended returns.

CLIENT ELIGIBILITY

This service is not available to any client who has been audited for any of the past three tax years. This service is not available to any client whom **DeFilippis Financial Group®** determines to be in a high audit risk group. This service is exclusively available for individual tax returns prepared by **DeFilippis Financial Group®**.

AGREEMENT

I hereby agree to the terms of **DeFilippis Financial Group®**'s Prepaid Audit Service and elect to purchase this service for tax year _____.

Tax Return Prep Fee \$ _____ x 25% = _____

Client Name _____ Date _____

Client Signature _____

For **DeFilippis Financial Group®**:

Preparer _____ Date _____

© DeFilippis Financial Group® (Rev. 01/10/2017)
» Cetera Financial Specialists LLC

INVESTMENT ADVISER REPRESENTATIVE
» Cetera Investment Advisers LLC