



Tax Protection Plan

PROTECT YOUR PEACE OF MIND. BEFORE THE IRS COMES CALLING

Tax notices and audits rarely come at a convenient time. Even routine issues can escalate quickly when responses are incomplete, delayed, or handled without the right expertise.

With the **Sorren Tax Protection Plan**, you have access to experienced professionals who understand how to navigate IRS and state communication and manage the response process. Instead of reacting under pressure or risking costly mistakes, you have a clear path forward and no surprise professional fees.

WHAT THE SORREN TAX PROTECTION PLAN COVERS

When you're enrolled, we step in to manage your representation from start to finish.

Professional Support for Notices & Audits

- We assist with IRS and state income tax notices and audits related to your covered returns.

Full Representation Through the Process

- We communicate directly with tax authorities on your behalf and guide you through every step of the administrative process.

Strategic Response & Documentation

- We review and interpret notices, develop a response strategy, prepare and submit responses and help organize and present required documentation, and obtain Power of Attorney when appropriate to work directly with the agency on your behalf

Ongoing Communication & Guidance

- You'll always know what's happening and what comes next.

WHY THIS MATTERS

Even when your taxes are filed correctly, receiving a notice from the IRS or a state agency can be stressful, confusing, and time-consuming.

Government agencies are increasing enforcement efforts and using more advanced systems to flag returns often resulting in more notices, more audits, and more errors being sent to taxpayers.

The reality:

- Notices are often unclear or even incorrect
- Responding properly requires time and expertise
- Professional representation can become costly quickly

That's where we come in.

The **Sorren Tax Protection Plan** takes away the worry of additional fees as well as the experience of our team to handle the process for you, so you're not navigating it alone.

HOW ENROLLMENT WORKS



Review Your Invoice

Your tax preparation invoice includes an optional line item for the Sorren Tax Protection Plus Plan.



Choose to Enroll

By paying that line item, you are automatically enrolled in the plan.



Stay Protected

Once enrolled, you'll have access to support for covered notices and audits during the coverage period.

No separate signup. No extra steps.

sorren.com