

A [REDACTED]
Bambi Vincent

P.O. Box [REDACTED]
Las Vegas, Nevada [REDACTED]
Voice: [REDACTED]
Fax: [REDACTED]
Bambia [REDACTED].com

April 21, 2011

UNNAMED POMS Claims Manager
H&R Block World Headquarters
One H&R Block Way
Kansas City, MO 64105

Re: Peace of Mind claim # [REDACTED] and case # [REDACTED]

Dear Unnamed POMS Claims Manager,

Thank you for your January 18 offer to settle your \$725.35 obligation for taxes owing on the 2008 return prepared by H&R Block under your Peace of Mind Plan. Your proffered check in the amount of \$47.35 is enclosed; not accepted. Your "reasons" for the "denied or partly denied" claim are absurd.

For almost 30 years, H&R Block, our trusted tax preparers, have advised us on allowable deductions. On the examination of our 2008 return, some of this advice proved to be wrong, and certain deductions were disallowed by the IRS. The Income Tax Examination Changes (form 4549) resulted in an amount due based entirely on advice given by HRB.

We hereby request that H&R Block immediately begin its reevaluation and resubmission. Below, we address each of your listed "reasons." Though the information supplied here is not "new," you will certainly find it "compelling." We shall quote your "reasons" and comment below each:

1. Substantiation

The Peace of Mind Plan does not apply to additional taxes assessed as a result of insufficient records that would support the deductions, credits, or other items on your tax return. Because you were unable to substantiate the information you provided to the tax professional, your claim is denied.

All H&R Block employees who have ever worked with us know that we are meticulous record-keepers and can substantiate all amounts, with receipts. That includes our assigned H&R Block Audit Representative Clare Hermis, and all the tax preparers we've used over the years including Richard Kielhorn, Carol Maddocks, Norman Honadle, Roberta Wright, and Timothy Morales.

To accuse us of "being unable to substantiate the information" simply proves that you have not checked your records on this case, or on us as H&R Block clients for approximately 30 years. If it is one thing we have, it is records. Ask Clare Hermis.

2. Failed to allow HRB to assist

The Peace of Mind Plan requires that you notify H&R Block of any audit and allow H&R Block to challenge the assessment. Because you did not allow us to assist you with the audit and/or allow us to challenge the assessment, your claim is denied.

The day we became aware of the audit, we phoned H&R Block for assistance. We were assigned an Audit Representative and met with her (Clare Hermis) at her first availability. Ms. Hermis gave us an exhaustive list of supporting documentation she wished us to compile, and we did so promptly. We followed every instruction given us by Ms. Hermis, up to and including her recommendation that we answer the auditor's questions minimally during the examination. Not only did we allow H&R Block to assist, we relied on H&R Block completely to guide us through the audit process, this being our first audit. While we do not know what "challenge the assessment" means, there is nothing we prevented H&R Block from doing on our behalf.

3. HRB not notified within 60 days

The Peace of Mind Plan requires you to contact H&R Block within 60 days (formerly 30 days) of the date of the notice from the taxing authority. Because you failed to contact us within the required time frame, your claim is denied.

We notified H&R Block of the audit the day we learned of it. We took the first available appointment, and on that day, Ms. Hermis presented us with an Audit Representation Engagement Letter, which we and she signed, along with Form 2848 Power of Attorney. From the start, Ms. Hermis was well aware of the date of the first notice from the taxing authority, and the extenuating circumstances of our delayed response (which was supported by full documentation and accepted by the IRS). At that first meeting on October 12, 2010, Ms. Hermis committed to represent us under the HRB Peace of Mind agreement. From the time she signed the Audit Representation Engagement Letter, Ms. Hermis's instructions to us, our completion of her assignments, and her representation of us at the IRS examination on November 22, 2010, were all under the auspices of the HRB POM plan. Any ineligibility due to a "required time frame" should have been raised at our first meeting.

Now, without further wasteful correspondence, please remit the \$725.35 owing under the HRB POM agreement.

Sincerely,

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Bambi Vincent

[Redacted Signature]

cc: H&R Block District Manager Monita Chapman

[Redacted]
Las Vegas, NV [Redacted]

P.S. This letter was originally mailed (with your \$47.35 check enclosed) on February 1, 2011, to Kansas City and to Monita Chapman in Las Vegas. Your lack of response is as despicable as your failure to uphold your promise. As you well know, our business keeps us away from home for weeks or months at a time. We therefore request your reply to be copied to us at [bambi@\[redacted\].com](mailto:bambi@[redacted].com). If you do not send an email copy, we may not know of your reply for weeks or months, depending on our work schedule and itinerary. —BV & AM