



Professional Services Benefits for IPEA Standard Members

Legal Services Benefit ¹

1. **Free telephone consultations on any subject.** This includes up to 1 hour of research at no charge if the matter cannot be adequately addressed during the telephone consultation. ²
2. **Free phone call or letter.** A phone call or letter from the attorney per subject matter if determined appropriate by the attorney.
3. **Free contract or document review.** Up to 10 pages each. ³
4. **Free PERSI Consultation.** Free review of annual PERSI statement and consultation.
5. **Free help with employment related issues.** Up to 2 hours of services to help you deal with personnel or disciplinary issues you might be having with your employer. ⁴
6. **Discounted Will preparation.** Standard wills (no tax implications) prepared for \$100. Includes free annual review and update.
7. **Discounted PERSI Retirement Consultation.** Consultation to review PERSI retirement options and forms for \$100. ⁵
8. **25% discount on other services.** All additional services are available at a discounted rate. ⁶

¹ Services are performed by an Idaho licensed attorney and are limited by jurisdictional restrictions.

² Limited to 5 per year.

³ Limited to 3 per year.

⁴ Limited to 2 hours per rolling calendar year. Must hold IPEA Standard Membership for 90 days before issues arose.

⁵ Standard rate is \$200.

⁶ Additional services available may be limited in the discretion of the attorney.

Accounting and Tax Benefit ¹

1. **Free telephone consultations on any subject.** This includes up to 30 minutes of free research if the question cannot be adequately addressed during the telephone consultation. ²
2. **Free review of the last two years of tax returns.** ³
3. **Up to two hours of free retirement income tax planning/consulting.** ⁴
4. **25% off tax return preparation, up to a maximum fee of \$500.** Average tax return fee ranges from \$150 to \$200 before the discount. ⁵
5. **25% off tax planning services.**

¹ Services are performed by Idaho licensed CPAs

² Limited to 5 per year.

³ Must be performed before December 31 of current calendar year.

⁴ Limited to 1 per year.

⁵ Some restrictions apply; bookkeeping and other services other than tax return preparation may not be subject to \$500 limitation.

Professional Services Benefits for IPEA Retiree Members

Legal Services Benefit: Benefits #s 1, 6, and 8 from above list

Accounting and Tax Benefit: Benefits #s 1 and 3 from above list