NEW BENEFIT ANNOUNCEMENT

Our Legal Plan Now Covers Tax Season

Tax help is now part of every IdentityIQ® Legal Protection Plan at no additional cost.

EFFECTIVE

Jan 1

Included in every plan

Tax filing is one of the few things every employee has to do. Come January they will now have a tax expert to call instead of guessing. **No new product to quote, no change to how it is administered.**

WHAT EMPLOYEES GET

$0

Federal return preparation

Typically $220–$323 professionally

2026 industry averages, incl. state*

A real preparer, not a software wizard. Most-used schedules included too.

Unlimited

Toll-free tax advice

Personal and business federal matters

Real answers on IRAs, capital gains, home ownership, inheritance and retirement.

$1M

Liability policy behind every answer

Tax program benefit

Advice from tax attorneys, CPAs, former auditors and IRS Enrolled Agents.

FOR BROKERS

A Must-Have a Conversation With Every Group

Legal plans look alike on a benefits summary, and a plan nobody uses is the first line a CFO questions. **Tax is the one benefit every employee reaches for every year** — which makes January the easiest renewal conversation on your calendar.

Groups with no legal plan
Utilization has always been the objection. Every employee files, so every employee has a reason to use the plan.

Groups up for renewal
Renewal is the one moment a group actually re-reads what it offers. Give them something new to read.

Groups already on IdentityIQ
Participation can grow without adding a product. Employees who declined last year have a new reason to elect.

Ask your IDIQ® account team for open enrollment materials.
Co-brandable flyers, member communications and enrollment support are available now.

***Preparation limits:** one per household. Covers Forms 1040, 1040A or 1040EZ with Schedules A, B and D of 14 or fewer entries. Returns with additional schedules or more than 15 entries are billed at $60 per hour or the then-current rate. Documents must be received by March 31 for deadline completion. © 2026 IDIQ® provider of IdentityIQ® services. All rights reserved. IdentityIQ is not a law firm, CPA firm, insurance carrier or provider of legal or tax services. Legal benefits administered by Legal Club of America Corporation; tax services provided by a contracted third-party provider. Terms and conditions apply. Benefits vary by plan.