



## The 7 Major Mistakes People Make When Dealing With The IRS

- 1. Procrastination, and ignoring collection notices.**
- 2. Not filing a tax return.**
- 3. Believe the IRS when they say, “Tell us what happened, and we’ll take care of the problem.”**
- 4. Failing to hire a Tax Attorney.**
- 5. Failing to contest a Tax Levy.**
- 6. Allowing the IRS to file a tax return on your behalf.**
- 7. Failing to remove a Federal Tax Lien from your record.**

### Our Law Firm’s Approach and What You Can Expect From Our Firm

#### Our 4-Step Plan to Solving Your Tax Problems:

- 1. We will discuss your tax problem and analyze it in detail.**
  - a. We strongly believe that it is critical that during your initial call, you speak directly to the Tax Attorney who will be handling your case.
  - b. We need to understand your tax and financial history. The process of gathering all your financial details is often not an easy process, so we work hard to find all the facts we need to effectively represent you.
  - c. At the initial meeting, we will discuss possible solutions to your case, and the fees for our services. We do not charge for this initial consultation. If you decide to engage our firm, we will prepare a written agreement of the terms of the engagement, including what we will do for you, and the cost.
  - d. Once you sign the retainer agreement, we will prepare a power of attorney form (IRS Form 2848) that enables us to speak to the IRS on your behalf. This power of attorney is limited to only representing you before the IRS, and is not a general Power of Attorney for your other affairs, such as estate planning, etc. The Power of Attorney that you sign is revocable by you at any time.
  - e. Once you hire us, and sign the Power of Attorney form, we will then immediately file the form 2848 with the IRS to show them that we are representing you. This means that all further contact between you and the IRS will be through us, and we will protect your rights. The other strategic benefit of immediately filing the Form 2848 is that when we file a Power of Attorney Form 2848 on your behalf, it is proof to the IRS of your intent to resolve the tax problem quickly. They view this step very favorably in deciding if your case warrants criminal prosecution.
  - f. Once we have the authority to represent you, we will take immediate steps to freeze the aggressive actions taken by the IRS (or New York State Tax Department) so you will not have to worry about the security of your assets while the case is in progress. If tax levies are already in place, we will work with you to have those levies lifted. The steps we take on your behalf will relieve you of stress, and enable you to work with us so we can help you resolve the tax problem.
- 2. We will make sure we collect all of the information that the IRS has related to your tax accounts and review it.**
  - a. We want to make sure we have all the tax information the IRS has related to your account so there are no surprises or misunderstandings of your tax issue.
  - b. Often, the tax data we get from the IRS will assist us in determining the best strategy for us to take to resolve your tax problem.
  - c. We will use the tax data from the IRS to compare it with the financial account information you provide us with in order to make sure that there is nothing missing from the data we are analyzing.
- 3. We need to collect financial information from you, and analyze it.**
  - a. This step requires us to obtain accurate financial documents from you in order to see what we can do to improve your situation and reduce your tax liabilities. We also need this information to prepare your tax returns. We will

prepare your tax returns, and will not outsource it to a CPA firm since we find that this only adds unnecessary complexity to

your case. The types of financial information that we will request from you include, wage statements, bank statements, mortgage statements, brokerage statements, Form 1099, etc.

b. When providing this information, it is important to remember that the tax authorities have the right to question any number on your tax return, so you need the correct guidance from us on what is allowable under the law, and what is not.

c. Once we carefully review all the documentation, we will analyze the situation to see what caused the tax problem in the first place, and how it can be corrected so it does not happen again.

d. We will work together with you to make sure your case is strong, and in your favor. With your cooperation and our professionalism, we guarantee you will have a strong case against the taxing authorities.

**4. We will develop an exclusive strategy to solve your tax problem.**

a. After we thoroughly review and discuss your current financial situation with you, we will assist you in deciding on a solution that best suits you. There are a variety of solutions including an Offer in Compromise, Tax Installment Agreement, or a variation of the two methods. We will discuss each solution with you, and advise you so you can make an informed decision.

b. Our expertise at negotiating with the IRS and the New York State Tax Department will allow you to pay off your debt in a reasonable and timely manner. Every moment you delay taking action to solve your tax problem increases the risk that your situation will get worse. You should not delay -- even if you do not have the money to pay the taxes owed -- since the IRS understands your situation and often allows a tax payment plan that is manageable.

If you are ready to start solving your tax problem, please call our office at (518) 213-3445 or (917) 382-5142, and ask for Timothy S. Hart, Tax Attorney and CPA.

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