



Frequently Asked Questions
&
Policies for
Tax Problem Resolution Clients

Q1. Is it necessary to provide requested data on a timely basis?

A1. It is essential to our helping you. We must make commitments to taxing agencies to win their cooperation. A major reason we are able to achieve positive results with the IRS on behalf of our clients is the credibility we have built with them by keeping our commitments. We will not jeopardize this hard-earned relationship as it benefits a majority of our clients.

Q2. Why is time of the essence?

A2. Many tax notices must be responded to quickly to avoid added problems such as property liens or levies against wages or other forms of income. Notices should never be ignored or put off.

Q3. What kind of time frame am I looking at to have this whole problem resolved?

A3. Elapsed time on tax problem cases is often longer than clients would like to expect. Cases may run over several months, as the responses from taxing agencies are often slow and out of our hands. Remember, you did not get into this situation overnight; you won't solve it overnight either.

Q4. Why do I have to sign a Power of Attorney Form?

A4. A Power of Attorney Form 2848 allows taxing agency personnel to discuss your confidential tax matters with us. The Powers of Attorney we ask you to sign does not allow us to perform any non-tax matter.

Q5. Do I still have to talk to the IRS?

A5. No. In fact, we rather you did not. We will handle correspondence with the IRS on your behalf and always keep you abreast of what is happening. We will never make a decision without first consulting with you.

Q6. Do you sign on my behalf with the IRS?

A6. As a matter of policy we do not. Although a Power of Attorney permits us to enter into an agreement on your behalf, we will meet with you, provide our recommendations, and allow you to sign directly for any obligations you will need to meet. This policy does not mean you have to meet with IRS Agents.

Q7. What is this going to cost me?

A7. Billing for services is done on a retainer basis. We will estimate a fee for the services we are anticipating rendering at the time of our initial consultation. We will require anywhere from 30% to 100% of the estimated amount be paid prior to commencement of services. The estimate of our fee is not binding as some cases become more complicated and time consuming than anticipated when the estimate was made. Fees are based on the value of the services rendered considering the expertise required in addition to expended time. Retainers are non-refundable. Therefore, we strongly recommend clients support our efforts to help them in a businesslike fashion. Failure to do so may result in our withdrawal from a matter. Should we find this action necessary any retainers will be deemed fully earned and non-refundable.

Q8. What if I cannot keep my scheduled appointment?

A8. If you find you cannot keep your scheduled appointment as much advance notice you can give our office the better. We require a minimum of 24-hour notice. Any broken appointments with less notice will be billed for the time set aside at standard hourly rates, unless a special circumstance applies. We regret the need to enforce this policy, but we are unable to schedule another client during that time without adequate notice.

Q9. Why does someone from your office need to call me?

A9. There will be time that you will receive a call requesting additional documents, or updating you on our progress. In the interest of efficiency, the calls may be made by staff members assisting in preparation of your case. If they need further information or documentation it is so that we may be efficient on your behalf.

Q10. Why do you request information from the IRS files on my tax situation?

A10. We need to have all of the information from the IRS files in order to analyze the situation and determine the next possible course of action for you.