



Collections Resolution - Our Process

July 19, 2022

How We Can Help



- **Are you about to file your tax returns but don't have enough money to send in payment - we can help**
- **Are you receiving notices from the IRS about your tax debt - we can help**
- **Did the IRS notify you that they intend to file a Notice of Tax Lien - we can help**
- **Were you just notified that the IRS intends to seize / levy your property - we can help**
- **Has the IRS already started taking your property - we can help**

Who Am I?



- **Sole practitioner in Plymouth MA**
- **Over 35 years of professional experience**
- **Over 25 years at Deloitte Tax - partner**
- **Boston University - BSBA**
- **Bentley University - Masters In Taxation**
- **University of Connecticut - IRS Representation Certificate Program**
- **Adjunct Professor at Suffolk University**

Pricing



- **Analysis / Consultation \$1.5k**
- **Offer In Compromise \$5.0k (less \$1.5k)**
- **Installment Agreement \$3.5k (less \$1.5k)**
- **Currently Not Collectable \$3.5k (less \$1.5k)**
- **Appeals Process - \$350/hour - \$2.5k retainer**

Analysis / Consultation



- Review your situation - income / expenses, assets / debts
- With a Power of Attorney we review your tax transcripts (IRS records)
- With software we analyze the transcript information along with your financial information
- We present you with alternatives based on our analysis

Debt Solutions



- If proceeding with a solution we'll prepare tax forms and gather your financial documents
- Submit the package to the IRS
- Deal directly with the IRS on your behalf
- Provide the IRS with details relating to your situation and follow up with document requests

Debt Resolution vs. Tax Return Preparation



- **Tax Law - well defined rules and regulations**
- **Debt Resolution - authorized by law but implemented by the IRS - Internal Revenue Manual**
- **Services Providers - should have experience with both tax law and IRS procedure**

Tax Preparation Services



- **“Compliance” is required to deal with any resolution of tax debt**
- **Many clients with debt also have outstanding tax filing / payment obligations**
- **We provide tax compliance services as well as business accounting assistance**