



Owner- USAF Retiree
Offering Veteran Discounts



27 questions to ask before you hire a professional to resolve your tax problems.

Our Answers

1. Where did you go to school to learn how to do tax resolution?

National Tax Practice Institute of the National Association of Enrolled Agents and the American Society of IRS Problem Solvers.

2. How many years have you practiced in tax resolution?

15 years, but we are always continuing our education through seminars, lectures, and new publications. This industry changes constantly. The only way to keep up is to be in it full time.

3. How much of your practice is devoted to resolving Internal Revenue Service tax debts for taxpayers versus traditional tax, accounting or legal work?

100% of our time is devoted to tax (Tax Resolution, Tax Preparation, Tax Consulting)

Most professionals with adequate knowledge and experience to handle tax problem resolution have at least 50% of their practice in tax resolution. At Legacy, 100% of our time is in tax.

4. Are you the person who will be in charge of solving my problem?

Our founder, Stephan Brewer, oversees each case personally. Mind you, he will not be the only one working your case.

Many firms use commissioned sales persons. Their job is to sell you their services, not solve your problem.

The Rescue Squad for Overtaxed and Troubled Taxpayers

Arizona Locations: Scottsdale | Chandler | Ahwatukee
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5. May I talk with the individual who will be in charge of solving my problem?

Stephan or the Case Manager are always available to discuss your case.

If not, run, don't walk.



6. Where are you located? Can I get your physical address?

Why is this important you say? You want to know that you are working with a company that does not want you to know the physical location so that they can change it anytime they need to. We have offices in Arizona, Nevada, New Mexico, Utah and Texas and we will continue to expand across the nation. We are not going anywhere.

7. What is the legal name of the firm so that I can research to see if the firm as any complaints?

Our Firm name is Legacy Tax & Resolution services, LLC. Please conduct your due diligence; we are proud of our record. The Arizona Board of Accountancy should be among that search.

8. What is your rating with the better business bureau?

Our rating is A+ Accredited. This is an important question to ask and you should check the rating with the bureau yourself. While you can't make everyone happy, this will tell you how they treat their clients.

9. What are the credentials of the people that will be working on my case?

The people that will be working directly on your case will be either an Enrolled Agent, a Certified Public Accountant or a Tax Attorney, depending on the severity of the case. Our case managers are all Certified Tax Resolution Specialists

10. What can you guarantee me will be my resolution and how long can you guarantee me that it will take?

Anyone who offers a guarantee of outcome in this industry is a charlatan - Be Careful! No one, if they are being honest and not just trying to get your credit card information, can offer you a GUARANTEED OUTCOME.

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We have the experience, skills and knowledge to resolve your problems quickly and efficiently but sorry, no guaranteed outcomes. We guarantee the quality of our work but no one should offer a guaranteed outcome.

If their website does offer an outcome guarantee or they verbally offer a guarantee, let them hear the dial tone!

11. How many offers in compromise have you negotiated?

On average we negotiate 150-180 Offers in Compromise per year.

12. What is your success rate in offers in compromise?

In a typical year, the IRS accepts less than 5% of all offers submitted. At Legacy, our success rate has been over 90% in some years and is currently 89.8% acceptance rate. Why almost 16 time the national average, because we will not take an Offer In Compromise case unless we believe we will be successful.

13. Have you ever appealed an offer in compromise rejection?

In today's extreme IRS enforcement mode, it's rare that any offer in compromise is accepted initially. After rejection, an appeal is required in nearly every compromise settlement. So, if someone tells you that they have not needed to appeal a case, hang up the phone before they ask for your credit card information.

14. How are your fees determined? Are they fixed? Are they based on a percentage of the resolution? Will I be signing a contract that will list the fees that I can expect?

Our fees are set in the engagement letter and are quoted in a narrow range. Why do we have to quote a narrow range? Because we cannot predict the person or persons that we will be talking to on your behalf. Our fees are based on recent experiences of the time that it will take to resolve your tax issues. If we venture outside of this range it will be because some unanticipated turn of events has happened and trust me, the change in fees will not be a surprise to you.

You should not work with a firm that will not fix it's fees, nor should you work with a firm that will not put it in writing.

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15. Will you verify that the IRS releases my Federal Tax Lien after my Offer in Compromise is approved?

The Offer in Compromise contract contains a provision requiring the IRS to release the federal tax lien within 30 days of full payment of the offer. Unfortunately they frequently "forget," or they release only one of several tax liens. Clearing these liens from your credit report is critical for you. We always verify release. In fact we take one step further by requesting a withdrawal. A withdrawal is as if the lien was never filed. It completely removes it from your credit as if it never happened. We have been very successful with withdrawals.

16. Have you ever negotiated a wage levy release?

Securing a levy release is one of our most common engagements. We typically handle 30-50 levy releases per month. They are not typically easy, some require more steps than others, but that is why you hire us.

17. How long does it take to get a wage levy released?

If all tax returns have been filed, Legacy can usually get the IRS to fax a release to your employer on the day we receive all necessary information from you. The IRS will release the levy in exchange for an Installment Agreement (payment plan) or classification of your liability as "Currently Not Collectible." If you have unfiled tax returns, we must file them before the IRS will release the levy.

If the person tells you that they can get your levy released without asking you any questions- HANG UP THE PHONE-- They just want your money.

18. Have you ever gotten a federal tax lien released?

Federal tax liens are handled by a special IRS section outside of the normal collections function. Release of the tax lien with anything other than full payment involves extensive paperwork, negotiation and time, usually 30 days or more. The tax lien is the most effective collection tool the IRS has. Understand this is their security blanket; they will not let this go easily. The lien is typically released at the end of the entire tax resolution process; unless we can convince the IRS it is in their best interest. What I am saying is that is not impossible, just very difficult.

Again, anyone who tells you that getting the lien released is no problem - well you know what to do!

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19. Have you ever gotten IRS penalties abated?

Yes, many many times. The IRS may abate penalties for “reasonable cause.” However, what reasonable cause is to you and I versus the IRS is significantly different. If you have strong, well-documented reasons to show the failure to pay or file was beyond your control, we are often successful in getting abatement.

20. Will you check my IRS transcripts to make sure my records are in order?

The IRS transcript is the IRS record of your tax account. According to the IRS, "if it's not in your transcript, it didn't happen." Right or wrong, it summarizes the tax problem which must be dealt with to resolve your case. At Legacy, we will almost always obtain your IRS transcripts online within 48 hours of receiving your Power of Attorney form. We don't like surprises.

21. Have you ever negotiated a reduced Installment Agreement?

A recent change in the law allows Installment Agreement payment plans which do not pay the tax liability in full over the remaining statute of limitations. Sometimes known as a "back door Offer in Compromise," a partial payment agreement involves financial disclosures and negotiations similar to an Offer in Compromise. We frequently negotiate partial payment agreements when our client can't pay the liability in full within the statute of limitations.

22. Have you ever negotiated an uncollectible status with the Internal Revenue Service?

Convincing the IRS that you are unable to pay them anything will stop all enforced collection by them. Unfortunately, it is usually a temporary solution, not a final resolution to your problem. We frequently are successful in negotiating this type of zero dollar payment plan. As I said this is only a temporary solution, so we will want to plan a more permanent resolution.

23. Will you consider use of the statute of limitations or bankruptcy to deal with my IRS problem?

Allowing the statute of limitations for collections to lapse is always the best method to deal with your tax liability if appropriate. We always check the statute date on old taxes. We also review bankruptcy as an alternative strategy to an Offer-in-Compromise.

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24. Are you a member of the American Society of IRS Problem Solvers or similar IRS problem resolution professional organization?

We're members of the American Society of IRS Problem Solvers, American Institute of Certified Public Accountants and the National Association of Enrolled Agents.

25. How many hours of continuing education did you take in IRS problem solving last year?

Most of us are required to complete 90 hours of continuing education every two years, most of that in tax resolution. Stephan our founder typically averages 120-150 hours, mostly because he is finishing up his JSM at Thomas Jefferson School of Law for US and International Tax Law.

26. Can you handle a state tax problem?

Yes, we can handle state tax problems. Many states are uncooperative and therefore our success in dealing with a state tax problem usually has a lower success rate unfortunately.

27. Are you a federally authorized tax practitioner licensed to represent taxpayers before the IRS?

Yes. All Enrolled Agents, CPAs and Attorneys are federally authorized to represent taxpayers. Tax preparers without these licenses cannot represent you before the IRS unless you are physically present or on the phone call to the IRS with them.



Call or email today!

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Stephan H. Brewer, CPA, CTRS, JSM Tax

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