



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

Below are our answers. Next you will have a blank version to use for your evaluation of other firms

Legacy Tax & Resolution Services, LLC

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

National Tax Practice Institute of the National Association of Enrolled Agents. American Society of IRS Problem Solvers. The owner holds the coveted designations of Certified Tax Resolutions Specialist (CTRS) from the American Society of Tax Problem Solvers and the NTPI Fellow from the National Tax Practice Institute.

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

20 years, but we are always getting more education through seminars, lectures, formal and continuing education. 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 the IRS problem resolution versus 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.

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, do not 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 throughout the country and 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 do 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 the clients and how they handle complaints.

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

The manager 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.

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 guaranteed outcome in this industry is a Charlatan- BEWARE. No one if they are being honest, not just trying to get your credit card information, can offer you a GUARANTEED OUTCOME.

We have the experience, skills and knowledge to resolve your problems quickly and efficiently but sorry no guarantees of outcome. We do however guarantee the quality of our work which you can find at <https://www.legacytaxresolutionservices.com/tax-problem-resolution/our-tax-resolution-guarantee>

If their website does or they verbally offer a guaranteed outcome, 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 by taxpayer without professional assistance. At Legacy, our success rate has been over 90% in some years and is currently 89.8% acceptance rate. Why almost 18 times 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 its fees, nor should you work with a firm that will not put it in writing.

15. Will you verify that the IRS releases the federal tax lien after my offer in compromise is approved?

The 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 release only one of several tax liens. Clearing these liens from your credit report is critical for you. We always verify release.

16. Have you ever negotiated a wage levy release?

Securing a levy release is one of our most common engagements. We typically handle 20-30 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 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 the 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!

19. Have you ever gotten IRS penalties abated?

Yes, many times. The IRS may abate penalties for "reasonable cause." What is reasonable cause 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 partial payment installment plan?

A recent change in the law allows installment 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 not pay the liability in full within the statute of limitations.

22. Have you ever negotiated currently not collectible status with the IRS?

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.

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 Tax Practice Institute of 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 100- 120 hours, mostly in tax resolution topics.

26. Can you handle a state tax problem?

Yes, as long as we are also handling a Federal tax problem. 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.

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Check out the review of 273 tax resolution firms based on a criterion of how I believe firms should be rated.

<https://www.legacytaxresolutionservices.com/about/tax-resolution-company-reviews>

“The Rescue Squad for Overtaxed and Troubled Individuals”

www.legacytaxresolutionservices.com

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See below your own blank scorecard.
Be careful!

Good, Bad and the Ugly- Make Your Own Comparison

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Notes