



## **28 questions to ask your prospective Tax Professional before you hire someone for tax preparation.**

**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 preparation 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 preparation work?**

29 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. Do the same people always service my account?**

As much as possible we try to always have the same team and the same preparer servicing the same account. That way they get to know the client and their unique circumstances

**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 person working on 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 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 has 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 complexity of the return.

10. Can you guarantee me a tax refund?

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 REFUND.

We have the experience, skills and knowledge to reduce your taxes to the lowest level legally possible, but sorry no guaranteed refund. We do however guarantee the quality of our work which you can find at <https://www.legacytaxresolutionsservices.com/tax-services/our-ironclad-guarantee>

**If their website does or they verbally offer a guaranteed refund, let them hear the dial tone!**

**11. What services beyond the usual tax preparation are offered?**

**We can help you with accounting, payroll, tax planning, business profit maximization coaching and entity structuring/planning. We also offer Tax Resolution and Debt Settlement/Bankruptcy.**

**12. How can your professionals help me make more money?**

**We help our client make more money in two ways; 1) Through tax planning, therefore, helping them keep more of what they make 2) Through Business Maximization Coaching, where you would work with a coach that understands your industry and work with you to reduce expenses and increase income.**

**13. Do you believe I'm paying too much, too little, or just the right amount of tax?**

**Tax planning is a big part of our tax preparation process, without it, its just putting numbers on forms. The prospect that you are talking to should be able to ask a few question to determine your effective tax rate, compare that against the norm in their firm and determine if they feel you are paying too much.**

*If they have no clue, let them hear the dial tone!*

**14. How are your fees determined? Are they fixed or hourly?**

**We will ask you a series of questions to determine the complexity of your return and the likely time that it will take to prepare. Some of the questions will attempt to determine how organized the material will be. For tax preparation, we will quote a narrow range based upon your answer to these questions. We do not offer an exact quote to allow for how the documents are presented and the human nature of people, some clients are more organized than others**

**15. Do you consider the firm to be tech savvy?**

**We consider ourselves to be extremely tech savvy. Our interactive tax organizers are on the cutting edge for any industry. We constantly keep improving our efficiency because we do quote in fixed fees, rather than hourly. The more efficient we are the more we make at no additional cost to you. The firms that change on an hourly rate, their incentive is for the job to take as long as it can.**

**16. Do you have other clients in my industry or similar tax circumstances?**

**Imagine this scenario: You hire an accountant based on the assumption he/she understands the basics of your business. Then, you find out he's never had a client like you before.**

**Avoid this disaster by asking about the tax professional's clients. As a national tax resolution firm, an average client comes to us with 4-6 years of unfiled returns and very short deadline. They are from all walks of life and industries. There is not a type of return, circumstance or industry that we have not handled before and likely many times.**

**17. How much professional education do you get annually?**

**Just having a designation isn't enough, especially if they have no designation or are a Registered Return Preparer. With the tax code and interpretations of the code changing every year, continuing education is really essential. EAs are required to have 72 hours of continuing education in a three-year period; each state sets its own requirements for CPAs. In most states, CPAs must take 80-90 hours of continuing education within a two-year period.**

**Many tax professionals take more than the minimum requirement for continuing education. Although more training doesn't necessarily mean the tax pro will be superior, it's certainly not a bad sign.**

**If the person tells you that they do not have a designation or some minimum number of continuing education hours-- PASS. The tax code is way too complex to leave it to someone learning at your expense.**

**18. Who will I be interacting with?**

**We are set up in teams. Returns are assigned to a preparer based upon the skill required to prepare the return. Next it goes to a junior reviewer assigned to that team who will review the preparation. Then it will go to a senior reviewer who's job it is to look at the initial preparation noted, look for any upper level ways to improve the return and make tax planning suggestions to improve future returns.**

**You would be working with a team manager for any questions or concerns.**

**19. What is your policy on returning phone calls?**

**Our policy is to always return calls within 24 hours. Sometimes it may be a message saying we are researching the question and when we will have an answer.**

**20. Are you available outside of Tax Season?**

**As a national Tax Resolution firm, we prepare taxes year-round. It is like Tax Season for us 365 days a year.**

**21. What are your normal hours of operation?**

**Someone will answer your call 24/7, 365 days a year. Our normal working hours are 06:30AM to 5PM, we need some time off too.**

**22. Do you conduct your own business and personal affairs in a reasonably efficient and sensible way?**

**Ask questions about the Tax Professional's approach to getting and serving clients, the role of staff, the use of technology – including computers, communications equipment and the Internet — as well as ways of keeping current, research methods, management of files and records, etc.**

**We are constantly trying to stay on the cutting edge of technology. Because we quote in fixed fees, the more we take advantage of technology the more profitable we are at no additional cost to the client. We use modern portal technology for data storage and to communicate tasks and status to our clients. Our clients can access our secure portal and determine the status of their project(s). We offer multiple methods of communication, email, fax, text and portal.**

**23. How are your fees calculated? Will you be charging me for every phone call?**

**To avoid friction later, it is essential to discuss the fee structure. Tax professionals may bill by the hour, form, overall return or some combination. After reviewing your previous returns and interviewing you, a tax professional should be able to give you a good-faith estimate of costs. If the professional uses a time-based system, discuss the hourly rate of the accountant and staff, overhead expense reimbursement (what is the cost of a fax?) and whether certain time is not billed.**

**Find out now whether a simple two-minute phone call or a one-page fax means an hour of billable time.**

**As mentioned before, our fees are fixed and will not change unless something was not disclosed in the fee quote interview. We do not charge for quick questions, we would rather have you call and ask before you make a mistake that can not be fixed. If the client requires more extensive time, we offer packages that allows the client as much time as they would like.**

**24. Will there be opportunity for me to minimize my fees by helping with what needs to be done?**

**Yes, the more the client uses the tools that we provide, the less time that the work will take**

**25. What's your experience with the IRS?**

**As a National Tax Resolution firm, we fully understand how the IRS work. As a matter of fact, we often know it better than they do. More, importantly, as a National Audit Representation firm, we know how returns need to be substantiated. We are intimately familiar with the IRS DIF Score and compare our clients to those statistics to help reduce their chance of an IRS Audit.**

**26. Do you consider yourself a conservative or more aggressive tax professional?**

**We consider ourselves on the aggressive side. As a National Audit Representation firm we know how to push the envelope. We will NEVER put our clients in a position that we cannot support. We will tell our clients when we are taking a deduction that is outside the norm (while still within the law) for most people.**

**27. How do you handle working with multiple entities?**

**If you have more than one entity under your name, be sure the person you hire can manage them simultaneously--a skill not all tax professionals possess. For, example, if you are leasing back a commercial property as an LLC and a retail store registered as a S-corporation, for example, you'll need a tax professional who can coordinate and track money moving between those entities**

**Yes. We look at an overall tax project as one interrelated account and strive for the best overall tax outcome.**

**28. How often will you communicate about tax issues?**

**We post on social media anything that we feel is important for a business owner or individual to know both currently or a potential change in the future. We do this daily and often multiple times a day. To stay current, all a client or prospective client has to do is subscribe to one of our social media channels. We also offer a monthly newsletter that can be tailored to the subscriber's interests.**

**Legacy Tax & Resolution Services, LLC**  
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**Check out our Testimonials**

**<https://www.legacytaxresolutionsservices.com/about/testimonials>**

**“The Rescue Squad for Overtaxed and Troubled Individuals”**

**[www.legacytaxresolutionsservices.com](http://www.legacytaxresolutionsservices.com)**

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See below your own blank scorecard.  
Be careful!

**Good, Bad and the Ugly- Make Your Own Comparison**

1. Where did you go to school to learn tax preparation work?
  
  
  
  
  
  
  
  
  
  
2. How many years have you practiced in tax preparation work?
  
  
  
  
  
  
  
  
  
  
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# Notes