29 questions to ask your prospective Accountant/Bookkeeper before you hire someone.

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 accounting 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. Check out https://www.legacytaxresolutionservices.com/accountingpayroll/outsourcing-your-accounting-team

3. How quickly are accounting services delivered?

Accounting information can get out of date quickly. Except for annual information, most accounting information should be no more than 10-30 days old. You should be able to access your up-to-date information and your CPA quickly and easily.

4. Do the same people always service my account?

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

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5. Are you the person who will be in charge of solving determine my needs?

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

Many firms use commissioned sales persons. Their job is to sell you their services, not really understanding your needs.

6. May I talk with the individual who will be in charge of solving my problem?

Stephan or the Team Manager are always available to discuss your account.

If not, run, do not walk.

7. 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.

8. 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.

9. 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.

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

The manager that will be working directly on your account will be either an Enrolled Agent, a Certified Public Accountant or a Tax Attorney, depending on the complexity of your needs.

11. Can you guarantee me a tax refund on my taxes?

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.legacytaxresolutionservices.com/tax-services/our-ironclad-guarantee

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

12. What services beyond the usual accounting 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.

13. 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.

14. 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 questions 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!

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

We will ask you a series of questions to determine the complexity of your accounting needs and the likely time that it will take to an average monthly basis. Some of the questions will attempt to determine how organized the material will be. For accounting, 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

16. Do you consider the firm to be tech savvy?

We consider ourselves to be extremely tech savvy. Our processes 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.

17. Do you perceive any conflict of interest?

Accountants work for dozens of firms and scores and sometimes hundreds of individuals. You should inquire if any of your direct competition is represented by the firm. If so, inquire as to how this conflict is handled. We will review our client list to make sure we are not already working with a direct competitor.

18. Do you have other clients in my industry or similar 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 and years of uncompleted accounting. 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.

19. 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.

20. Who will I be interacting with?

We are set up in teams. Accounts are assigned to a accountant based upon the skill required to properly handle the account. Next it goes to a junior reviewer assigned to that team who will review the work done. Then it will go to a senior reviewer who's job it is to look at the initial

notes, look for any upper level ways to improve the financials and make tax planning suggestions to improve future tax outcomes.

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

21. 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.

22. 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.

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

Ask questions about the Accountant'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.

24. 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. Accountants may bill by the hour, form, overall process or some combination. After reviewing your previous returns and interviewing you, a Accountant 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.

25. 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

26. 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.

27. 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 out clients when we are taking a deduction that is outside the norm (while still within the law) for most people.

28. 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.

29. 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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www.legacytaxresolutionservices.com

Check out our Testimonials

https://www.legacytaxresolutionservices.com/about/testimonials

"The Rescue Squad for Overtaxed and Troubled Individuals"

www.legacytaxresolutionservices.com

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Offices in Scottsdale, Chandler and Phoenix, Arizona	Local Phone 480-907-6644
Offices in Las Vegas, Henderson and Reno, Nevada	Local Phone 702-659-9015
Offices in Houston, San Antonio and Dallas/Fort Worth in TX	Local Phone 469-546-9557
Office in Salt Lake City in Utah	Local Phone 385-355-3223
Office in Albuquerque in New Mexico	Local Phone 505-796-6076
Office in New York City in New York	Local Phone 718-732-4177
Office in Chicago in Illinois	Local Phone 312-379-8802
Office in Atlanta in Georgia	Local Phone 404-566-7930
Office in Philadelphia in Pennsylvania	Local Phone 215-795-3776
Office in Boston in Massachusetts	Local Phone 617-993-0044
Office in Rutherford in New Jersey	Local Phone 201-450-9700

See below your own blank scorecard.
Be careful!

Good, Bad and the Ugly- Make Your Own Comparison

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Notes