



## LEGACY TAX & RESOLUTION SERVICES, LLC

June 25, 2015

**VIA EMAIL:** *John.Q.Public@gmail.com*

John and Mary Public  
8526 W. Public Court Dr..  
Chandler, AZ 85224

### **RE: Plan of Action**

Dear John and Mary,

Please allow this correspondence to serve as an update relative to my representation on your behalf with the Internal Revenue Service. Recently, we provided you with a Tax Compliance Status Report listing the issues that needed to be addressed in your tax resolution. This document will serve as a Plan of Action for your overall tax resolution. The Plan of Action is broken into two sections (Compliance and Resolution).

### **COMPLIANCE**

As listed on your Tax Compliance Status Report, the following items must be addressed immediately;

The following returns are currently being reported as *missing* and need to be filed immediately:

Form 1040 – U.S. Individual Income Tax Return for the following periods:

- 2012 – The current balance due on this period was derived from a Substitute for Return which the Internal Revenue Service filed on your behalf. Once this return is filed, in most cases it reduces the total balance due for this period.
- 2013 – SFR to be prepared within the next 60 days
- 2014 – SFR to be prepared within the next 60 days

In order to remove the civil penalties we will need to show that the balance was paid and misapplied by the service. We have a copy of the transcripts indicating payment and will be presenting it to the Revenue Officer

### **RESOLUTION**

The resolution phase of the Plan of Action is subject to change based upon the outcome of the Compliance Phase. As such, this section will only list the initial resolution actions that will be taken to avoid immediate collection actions. Tax Resolution is a constantly changing situation

and will require adjustment and changes as your situation changes/develops or the agency takes actions.

We have requested a 60 day hold on any immediate collection actions to allow you to become compliant.

Once in compliance, we will provide you with the Post Compliance Resolution Plan of Action. At that time we will present your best resolution options.

If you have any questions or concerns, please feel free to call us directly at anytime at: (480) 907-6644. We appreciate your anticipated cooperation throughout this process and look forward to speaking with you soon.

Kind Regards,

*Stephan H. Brewer*

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“The Rescue Squad for Overtaxed and Troubled Taxpayers”

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