



Managing Client Expectations: Roadmap to Resolution

What to Expect When Resolving Your Tax Debt

Many of our clients who retain our tax relief services are interested in knowing two things:

- 1) Can you settle this for less than I owe?
- 2) How long will this take?

Upon retaining our firm to resolve your tax issue, some of the relief will be immediate and some will be over time. It is important to keep in mind that IRS problems did not come about overnight and will take time to resolve. The good news is that you won't have to meet or speak with the IRS while we are representing you. An average Offer in Compromise (OIC) case can take anywhere from 6-12 months (or longer) depending on the amount of tax liability owed, the complexity of the case, and your individual facts and circumstances.

Road Map to Resolution

Free Consultation: If you have never been a client of ours, the first step is to call for your confidential, no obligation free consultation. On this call, an experienced tax resolution consultant, CPA, Attorney or Enrolled Agent will evaluate your situation and discuss all available options for resolving your matter. This generally takes about 30-45 minutes; however, there are times where the information provided at this meeting is not sufficient to determine a course of action. It is advised therefore to have all recent notices and correspondence from the IRS available during our first in-person or telephone consultation. The first step is to hire us to obtain your IRS transcripts and Record of Account so we can best evaluate all of your alternative settlement options.

1. **Retaining Our Firm:** At the end of your consultation, **and if selected** as a good “fit” for our firm, you will be given the opportunity to retain us as your tax representative. You will be required to sign an Engagement Letter and make financial arrangements to pay for our tax help services.

We will file a Power of Attorney (POA) with the IRS. This will provide you with immediate relief because We will attempt to get a collection hold (no enforced collection) on your account and from this point forward, the IRS will be required to contact us instead of you. If an IRS representative should happen to contact you, all you need to do is provide our contact information, including phone number, and politely request that he or she contact BH Tax Relief directly. A separate POA will be required for any state problem you have retained us for as well.

2. **Beginning the Tax Resolution Process:** You will be assigned a case manager who oversees your case. All our case managers are licensed professionals and are extremely qualified. Our case managers are Attorneys, Certified Public Accountants or Enrolled Agents. Together we will develop a phased strategy for resolving your case and advise you on what steps to take for the most effective resolution. Your case manager is available to you by phone, individual e-mail, or if necessary, in person. At BH Tax Relief we employ the team approach to resolving your tax problems. Our case managers are supported by a staff of experienced technical specialists who will be your point of contact.

3. **IRS Compliance:** Generally, before any negotiation/settlement will be accepted by the IRS, you must become a compliant taxpayer. Compliance means that all past due delinquent income tax returns must be prepared and filed. Compliance also means you have to be “current” on you quarterly estimated income tax payments and you must be withholding at the correct rate if a wage earner. Your case manager is experienced in what must be done to achieve compliance and will advise you accordingly. If you cannot furnish records necessary to prepare your taxes, BH Tax Relief has developed methods, in accordance with IRS regulations, for completing the preparation of tax returns to get them filed right away.

4. Your (the Client's) Responsibilities: Clients who achieve successful resolution of their matters have the following traits in common: They view the relationship with us as a collaborative one. They view this as a “project” that requires cooperation. They follow through, on a TIMELY basis, with our requests for information and documentation. Clients who achieve stated resolution goals return our phone calls and emails timely and stay in contact with us throughout the duration of their case.

5. Tax Settlement Negotiation: We will propose a plan of resolution to the IRS that you can live with and see through to acceptance. We have an excellent IRS settlement track record rate and pride ourselves in obtaining the best (lowest) settlement for you under the law. It is rare, however, that a proposal is accepted right away. Through diligence, persistence, and follow-up our knowledgeable staff will monitor, provide additional information to the IRS as needed, and negotiate your proposed resolution until a resolution is achieved.

6. Tax Resolution is Reached: We will review the final resolution of your case by the IRS to make sure it is as agreed upon. If not, we will insist that it be changed to reflect what was agreed to. If the IRS is unwilling to do this, we will advise you as to what your options are for the next step. Finally, you will be advised on what you must do to succeed with your resolution and avoid future tax problems.