

WHO TO CALL  
THE IRS vs ACCOUNTANTS



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## START WITH US MOST OF THE TIME!

We always aim to be your first line of defense when it comes to dealing with tax issues, but occasionally, we get calls from clients asking if they need to contact the IRS directly.

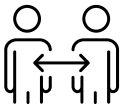
We've outlined the circumstances where you may want to speak to them directly and where you should start with our team (spoiler: you should almost always start with us):



**General Tax Inquiries** | For general questions about tax laws, regulations, or procedures, it's often best to give our team a call or shoot us an email. We have knowledge and context about your financial situation and can talk you through any upcoming changes. We can also simplify complicated tax rules and help maximize your deductions.



**Notice or Letter from the IRS** | If you receive a notice or letter from the IRS regarding your tax return, it's crucial to involve our team. Send us a copy of the notice, so we can review it and determine whether there was an error on your return or the IRS potentially made a miscalculation (or has incomplete information). Often times, we are able to reach an IRS representative faster than you, so you might as well start with us!



**Tax Return Preparation and Filing** | We're your go-to for preparing and filing your tax returns. We will work closely together to determine what documentation you need and how to best file your return to minimize your taxes.



**Tax Disputes or Audits** | In the event that you find yourself the center of a tax dispute or an audit by the IRS, we can assist you with gathering the required documentation, preparing responses, and representing your interests during any communication or negotiation with the IRS.



**Identity Verification** | If you receive a letter requesting that you verify your identity with the IRS before they process your return, you'll need to contact the IRS directly. That said, consider sending our team a copy of the notice first, so we can review it and verify that it's a legitimate notice.

Remember, our team of professionals is here for you year-round (and not just during tax season!). We welcome the opportunity to provide the guidance and support you need to navigate the complex world of taxes with confidence.

Thank you for your continued trust and partnership!



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