

Services

Service Categories:

- Non-Financial
- Financial
- Consultations
- Student Loan
- Tax Preparation

Non-Financial

Non-Disclosure Installment Agreement (NDIA)

- This is a monthly Installment Agreement where the client pays their balance over 72 months without disclosing any financial information. They must be in compliance (see the tax preparation section for more information) and the balance must be under \$250,000.

Facilitation of Tax Debt Pay Off

- The client intends to pay their debt in full in 30, 60, 90 or 120 days.

Financial

Affordable Payment Plan, Asset Protection Plan, and Affordable Settlement Plan

- All three services involve an analysis of the client's income and expenses in order to set up a plan that fits into their budget. They are titled differently to highlight the client's ultimate goal.
 - The client's financial information will be disclosed to the IRS.
 - After completing a client's financial the Tax Analyst will discuss if they qualify for Currently Non-Collectable, a Partial Pay Installment Agreement or if a Non-Disclosure Installment Agreement is in their best interest

Offer in Compromise (OIC)

- If the client qualifies the IRS may settle their debt for less than they owe.

Customized Resolution Plan

- The Tax Analyst will review financials and the likelihood of the client qualifying for an OIC and recommend the best resolution.

Consultations

Power of Attorney Consultation for Federal Balances

- The service can cover anything from obtaining a payoff amount, a Non-Disclosure Installment Agreement, or preparing a financial statement for submission to the IRS.
- If the client decides not to move forward with any resolution this can still be closed as a consult.

Power of Attorney Consultation for State Balances

- Every state has different requirements. Once a state Power of Attorney form is signed and processed the LTP will provide a Balance and Compliance (B&C) Letter with the client's options and information on balances.
 - Depending on what the state allows, we can set up a Non-Disclosure Installment Agreement, a financial based resolution or a Pay in Full.
- If the client decides not to move forward with any resolution this can still be closed as a consult.

State Evaluation

- This is stripped down version of the above service where Tax Defense Network will contact the state to verify the client's situation and available options BUT will not pursue a resolution on behalf of the client unless they wish to contract for additional services.

Resolution Integrity Investigation

- Client previously engaged MoneySolver for tax resolution services and has received information indicating issues with the previous established agreement. This will be assigned to an LTP and TA to investigate the circumstances and determine if this is something we can fix or if the client will need to re contract for additional services.

Student Loan Services

Student Loan Premium

- We conduct an investigation into the client's student loans and determine what the best resolutions option are. We then help prepare the necessary documents to submit to their providers.

Student Loan Premium Plus

- After following all steps in the premium service we then submit the documents to the provider and verify the resolution was set up properly.

Tax Preparation and Tax Prep Only Services

- For almost all resolutions a client must be in compliance. The IRS compliance means tax returns must be filed for the last 6 years. IRS compliance includes tax years 2015-2019. On April 15th that will change to 2015-2020. Each State Department of Revenue may differ from the IRS on the tax years they require for compliance.

Federal and/or State Returns

- We will prepare all listed returns. The Tax Analyst is responsible for collecting the necessary documentation to complete the returns and communicating to the Tax Prep team when to start working on the returns.

Amended Federal or State Return

- The tax prep team will amend returns that were previously completed and submitted. This is usually to lower the client's tax liability. The Tax Analyst is responsible for collecting the necessary documentation to complete the returns and communicating to the Tax Prep team when to start working on the amended returns.

Bookkeeping

- This service is added if the client needs us to prepare the financial statement from their accounting records, such as a profit and loss needed to complete their tax return. MoneySolver has a team of bookkeepers to prepare these statements. As a Tax Analyst, you will be responsible to queue for tax prep once the bookkeeping services are complete.

Audit Services

- **Audit Representation:** If this service is listed, it means that the client is currently being audited by the IRS for the tax years listed on the service agreement. Your job as a tax analyst is to request all correspondence the client has received from the IRS regarding the exam, and then to queue the audit representation with our tax preparation department.
- **Audit Reconsideration and Revision:** The only difference between the previous services is that the IRS has already completed the examination of the specific tax years, and the resulting balance has been finalized with the IRS. In this case the client has hired us to

dispute the original exam (audit) results and supply additional supporting documentation to reduce the original exam balance.

- **Audit Analysis Consultation:** The purpose of this service is to provide our client a comprehensive explanation of the examination assessment along with analyzing whether an audit reconsideration or representation service is appropriate in this circumstance. This service does not involve representation for the audit.

Forensic Tax Analysis (FTA/CTA)

- The goal of this service is to provide the client with an explanation of why they owe.