



# **Representation and Resolution Guide For Prospective Clients**



## STEP 1 · Representation & Authorization

To begin, we conduct a complimentary interview to understand the details of your tax situation. During this review, we assess your balances, filing history, and exposure to potential collections. We only accept cases when we believe our team can make a meaningful impact—protecting you from enforcement and improving or eliminating your outstanding tax burden. This free analysis ensures representation is the right step for you before any commitment is made.

### Key Forms And What They Mean

#### IRS Form 2848 –

Authorizes Wynn Tax Solutions' enrolled agents to represent you directly before the IRS. This allows us to speak with IRS agents, receive notices, and advocate on your behalf.

#### IRS Form 8821 –

Grants permission to access your IRS account records and master file. Used for gathering transcripts, verifying balances, and identifying missing returns.

## TAKING ACTION

1. Complete your free interview to review your situation and eligibility.
2. Sign your Power of Attorney so we can contact the IRS and state directly.
3. Send in recent notices or tax details for quick verification.
4. We file your authorizations and start your compliance review.



## STEP 2 · Intake & Investigation

During intake, you'll complete a detailed Tax Organizer that helps us understand your filings, finances, and any life events that contributed to your tax situation. This information gives our team the context needed to address the years in question accurately. Once your Power of Attorney is processed, our enrolled agents contact the IRS directly to pull your transcripts and review your account. This step allows us to identify the causes of your balance and determine the most effective path forward.

### Compliance and Balance Investigation

#### Transcript Analysis --

Our enrolled agents pull your IRS master file and wage & income transcripts to verify balances, filings, and account activity.

#### Compliance Check Call --

We contact the IRS directly to confirm your current status, identify active collections, and note any upcoming enforcement deadlines.

## TAKING ACTION

1. Complete your Tax Organizer to provide details, documents, and background on your case.
2. We establish representation with the IRS.
3. Enrolled agents contact the IRS to conduct your compliance check and pull transcripts.
4. Review your records to confirm balances, deadlines, and the next best steps.



## STEP 3 • Compliance & Protection

Before any resolution can move forward, you must first be fully compliant with IRS and state filing requirements. Our tax preparers file all missing or unfiled returns to bring your record current. We also confirm your standing with state tax agencies and address any immediate compliance gaps. In some cases, this step includes setting up an initial payment plan to help lift active levies or garnishments while we work toward your long-term resolution.

### Filing Returns and Collection Intervention

#### Filing Returns --

We file all missing returns using your wage and income data to bring you into full compliance and stop balances from growing.

#### Collection Intervention --

Where possible, we take immediate steps to lift levies or halt garnishments while meeting payment requirements as your resolution phase is prepared.

## TAKING ACTION

1. Review and sign your prepared tax returns for all unfiled years.
2. File your returns and update your IRS and state balances based on accurate figures.
3. Contact the IRS and state to confirm your compliance status.
4. Where possible, negotiate short-term relief to lift levies or halt garnishments while your resolution plan is prepared.



## STEP 4 • In-Depth Consultation

During this phase, a senior consultant reviews your case findings and outlines the strategies best suited to your situation. These may include penalty abatements, due process hearings, or hardship applications designed to maximize savings and secure lasting relief. We clearly define what each option means for your case and set realistic expectations for every potential outcome.

### Comprehensive Tax Strategy

#### Case Review & Planning --

We break down the realities of your tax balance and outline the steps needed to resolve your case. This includes identifying immediate actions and mapping the path toward long-term financial stability.

#### Future Readiness --

We address any business or external tax issues alongside your personal debt, developing plans for incorporation, structure, and preventive strategies to reduce future exposure.

## TAKING ACTION

1. We review your full IRS and state records to confirm balances and eligibility for relief programs.
2. A senior consultant explains your resolution options and outlines the strategy designed for your case.
3. Discuss long-term solutions to prevent future tax or business exposure.
4. Approve the plan so our team can move forward with implementation.



## STEP 5 • Resolution & Finalization

In this phase, we set your resolution plan into motion and pursue every opportunity to reduce your balances. Our enrolled agents attend your due process hearing as your authorized representatives, presenting the long-term strategy best suited to your situation. The most common remedy is a penalty abatement, which can reduce your total tax bill by 20–50% if you qualify. We may also secure a hardship status to pause collections while you regain stability. Once this step is complete, the most difficult work is behind you.

### Due Process Representation & Abatements

#### Due Process Hearing --

We represent you directly in your hearing, presenting verified data and your resolution plan. This step turns our strategy into official action with the IRS.

#### Abatements and Hardship --

We apply for penalty reductions and relief programs to secure meaningful savings and ensure your case concludes with the best possible outcome.

## TAKING ACTION

1. Schedule and attend your due process hearing to present your case directly to the IRS.
2. Submit supporting documents to formalize your resolution plan.
3. Apply for penalty abatements or hardship relief to reduce your balance where eligible.
4. Receive confirmation of resolution status and next steps for maintaining compliance.



## STEP 6 · Long Term Compliance

After your resolution is in place, we continue to monitor your case and keep you compliant through the remaining years of your relief period. Our team files your returns, updates your documentation, and checks in regularly to ensure no new financial issues arise. During this time, we work to protect your income and assets from collections until your balance fully expires. Our goal is to leave you with a clean slate, a clear roadmap for staying compliant, and the peace of mind that comes with no more IRS surprises.

### Status Maintenance & Long Term Filing Case Monitoring--

We file your taxes each year, conduct quarterly financial reviews, and ensure your records stay current throughout the relief period.

### IRS Statute of Limitations --

We track the expiration dates on your IRS collections window to protect your income and assets until your remaining balance fully expires.

## TAKING ACTION

1. File your annual and quarterly returns to maintain full compliance.
2. Perform periodic financial reviews to keep your records current.
3. Monitor your IRS statute dates and protect your assets through the expiration period.
4. Stay informed and compliant while we guide you toward long-term financial stability.