

## ***Important --- Please Read This Before We Meet***

Other taxpayers have already hired us, and we look forward to having you benefit from our services too. We have prepared this information guide so you can learn how to interview and select a Tax Resolution Professional to help solve your IRS problems.

### **Please spend about 15-20 minutes to review the following enclosed items before we meet:**

- Q **7 Myths About Tax Resolution Professionals:** Helps you separate fact from fiction when selecting a Tax Resolution Professional.
- Q **Our 8 Point Plan To Resolving Your Tax Problem:** This is our unique, systematic, all-inclusive approach to understanding and solving your tax problem.

### **Please complete the following 3 forms before our appointment:**

- Q **Client intake sheet:** Please tell us a little bit about yourself. The information you provide is confidential.
- Q **What's Important To You?** All your questions will be answered!
- Q **Why do you want to solve your tax problem now?** The more we understand your objectives, the better we can serve you.

Norman D. McKellar, Esq.  
The McKellar Law Firm, PLLC  
603 Main Street, Suite 405, Knoxville, TN 37902  
3350 Riverwood Pkwy, Suite 1900, Atlanta, GA 30339  
Phone 865-566-0125 (TN)      770-984-5327 (GA)  
[www.HelpingClients.com](http://www.HelpingClients.com)

## **7 Myths About Tax Resolution Professionals**

### **Myth #1: All tax professionals have basically the same training.**

*The Truth:* Not all tax professionals have the same training. Certain tax professionals are members of organizations such as the American Society of IRS Problem Solvers, which are dedicated to continued training and education of tax professionals so that they can effectively help people resolve their tax problems.

### **Myth #2: All attorneys and accountants have experience with the IRS.**

*The Truth:* Only a small percentage of lawyers and accountants have any experience dealing with the IRS. Some attorneys simply prepare documents and many accountants deal only with accounting matters.

### **Myth #3: Former IRS employees have special connections that give them an inside edge over other tax professionals.**

*The Truth:* All IRS problems are resolved based on the facts of the case, the applicable law and the skill of the Tax Resolution Professional. Personal connections simply do not come into play.

### **Myth #4: The large national tax resolution firms have an advantage over a local Tax Resolution Professional.**

*The Truth:* National firms have no advantage over local Tax Resolution Professionals and often are at a disadvantage. A local Tax Resolution Professional is in a unique position of understanding not only the local economy and the local Revenue Officers, but also any other issues that may affect taxpayers living in this area.

### **Myth #5: Attorneys and accountants who advertise on TV must be super-successful.**

*The Truth:* A 30-second ad on TV is not necessarily a sign of success. Some tax professionals run a “volume practice,” hoping to make a little money off each case. Shockingly, in some offices, para-professionals handle virtually the entire case.

### **Myth #6: Tax Professionals listed on Internet directories are carefully screened for qualifications.**

*The Truth:* Most Internet directories are nothing more than another advertising media. Sometimes, the only qualification required in order to be listed is the ability to pay big bucks for an “exclusive listing.”

### **Myth #7: A tax professional who can guarantee results must be better than those who do not guarantee results.**

*The Truth:* No legitimate Tax Resolution Professional can guarantee results. It is the IRS who ultimately decides the outcome of your case. It is only by choosing a skilled Tax Resolution Professional that you can enhance your chances for a positive result.

## **Our 8-Point Plan For Resolving Your Tax Problem**

### **1. We will meet with you and thoroughly discuss your tax situation.**

It is important that we obtain a thorough understanding of your unique tax situation. This personal interview will provide us with the background needed to develop the appropriate strategy for solving your IRS problem.

### **2. We will prepare a Power of Attorney for you to sign.**

With the Power of Attorney, we put the IRS on notice that we are representing you. All future telephone calls from the IRS should come to us and not you.

### **3. We will obtain transcripts of your accounts from the IRS.**

By reviewing your IRS transcripts, we will be able to accurately determine what the IRS thinks it knows about your tax situation.

### **4. We will develop the appropriate strategy for solving your IRS problem.**

Every taxpayer's situation is unique. With the information you have provided, we will develop a strategy aimed at getting you the lowest possible settlement allowed by law.

### **5. We will send you an easy-to-follow checklist of additional information you need to provide.**

Preparing complicated IRS forms is our business. You, however, will have to provide us the information needed to complete these IRS forms. We will make this process as easy as possible by sending you our easy-to-follow checklist.

### **6. We will prepare all forms required by the IRS to resolve your IRS problems.**

We will prepare all forms required by the IRS. All you have to do is review these forms and sign them. We take care of the rest.

### **7. We will negotiate with the IRS to obtain the lowest possible settlement allowed by law.**

We will handle all negotiations with the IRS in order to get you the best deal possible.

### **8. We will thoroughly discuss all aspects of your settlement with you.**

We will explain all aspects of your settlement with you and will answer any and all questions you may have. We want to make sure you are completely satisfied.

# The McKellar Law Firm, PLLC

## Attorneys and Counselors at Law

603 Main Street, Suite 405  
Knoxville, Tennessee 37922  
(865) 566-0125

Retainer: \$ \_\_\_\_\_

Flat Fee: \$ \_\_\_\_\_

Hourly Rate: \$ \_\_\_\_\_

The information furnished by you on this form is confidential. It has been requested in order to assist the attorney in the handling of your case and will not be released without your consent.

Date of Initial Consultation \_\_\_\_\_

### TAXPAYER

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

PHONE (HOME): \_\_\_\_\_

(WORK): \_\_\_\_\_

(CELL): \_\_\_\_\_

SOCIAL SECURITY#: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

EMAIL: \_\_\_\_\_

MARITAL STATUS: Single \_\_\_\_\_ Married \_\_\_\_\_ Separated \_\_\_\_\_ Divorced \_\_\_\_\_ Widowed \_\_\_\_\_

### SPOUSE

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

PHONE (HOME): \_\_\_\_\_

(WORK): \_\_\_\_\_

(CELL): \_\_\_\_\_

SOCIAL SECURITY #: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

### How did you hear about our law firm?

\_\_\_\_\_

If self-employed, is your business facing tax problems? \_\_\_\_\_ If so, please describe the nature of the problems:

\_\_\_\_\_

\_\_\_\_\_

Has the IRS contacted you yet about an audit or about money owed to the IRS? If so, please describe the nature of the contact:

\_\_\_\_\_

### Yearly Income

Year	Gross income/year	Where employed?	Spouse's gross income/year	Where was/is spouse employed?
2011 (year to date)				
2010				
2009				

**Tax Returns**

Year	Tax returns filed?	If not, why not	Spouse filed tax returns?	If not, why not?
2010				
2009				
2008				

**Bankruptcy**

Type of bankruptcy (Ch. 7 or Ch. 13)	Date filed	Was case completed or dismissed?	When was case closed by Court	Case number

**Real Estate**

Property address	Date purchased	Purchase price	Value now	Total debt owed on property

**Vehicles**

Year/make/model of vehicle & mileage	Date acquired	In whose name	Value now	Total debt owed on property	Own or Lease?

**Bank Accounts**

Name of bank	Checking/savings?	In whose name	Current balance

**Please identify any pension, 401(k) or profit-sharing programs in which you participate.**

Name of financial institution	Type of plan	In whose name	Are you still contributing?	Current balance	Any loans against this plan?

**Other assets not yet described** (e.g., boats, stocks/bonds, antiques, musical instruments, valuable collections, insurance policies with cash value, guns, sporting equipment, jewelry, etc.)

Asset description	Current value	Who owns this asset?	Has asset been pledged as collateral for a loan?

**Expenses**

	Total Amount of Debt	Monthly Payment
Credit Cards		
Health Care		
Taxes (from Income and FICA)		
Court Ordered Payments		
Child/Dependent Care		
Life Insurance		
Other Expenses		
Other Expenses		
<b>Other Expenses</b>		

# Why Do You Want To Solve Your Tax Problem Now?

**The more we understand your objectives, the better we can serve you!**

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## What Is Most Important To You?

**Your questions deserve answers! Let us know what is important to you!**

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