

See What We've Accomplished!

Assessments - \$12,281,801 Settlements - \$656,593 Average Reduction - 94.65%

Audits/ Examinations of Returns Prepared by Others

Year Completed	Type of Tax Issue	Cause of the Problem	Initial Assessment of IRS	Results of Work Done	Payments Due from Taxpayer	Current Case Status
2001	Back Taxes 86 to 97	CPA error	\$157,262	Reduction	\$32,083	Accepted - case closed
2003	Audit of 1986-1997	IRS & Taxpayer Error	\$116,319	Refund	(\$10,239)	Accepted - case closed
2008	Audit 2006	IRS Error	\$36,000	Reduction	\$2,350	Accepted - case closed
2009	Audit 1995 & 1996	IRS BC Error	\$7,837	Refund	(\$9,049)	Accepted - case closed
2009	Audit 2006 & 7	CPA error	\$63,125	Refund	(\$7,790)	Accepted - case closed
2010	Audit 2002-2006	Prior discrepancies	\$165,000	Reduction	\$8,993	Accepted - case closed
2011	Audit Sales Tax (06-10)	Routine	\$43,047	Reduction	\$2,485	Accepted - case closed
2013	Audit Sales Tax (09-12)	Prior discrepancies	\$21,997	Reduction	\$1,654	Accepted - case closed
2013	Audit - W-2 vs 1099	IRS Error	\$64,000	Reduction		Accepted - case closed
2013	Audit 2009-2011	TP Failure	\$269,092	Reduction	\$4,113	Accepted - case closed
2014	Audit Sales Tax (09-12)	TP Failure	\$201,384	Reduction	\$5,500	Accepted - case closed
2014	Audit 2010-2012 TWC	TWC Error	\$20,905	Reduction		Accepted - case closed
2015	Audit 2011-2012	IRS & Taxpayer Error	\$65,653	Reduction	\$7,359	Accepted - case closed
2015	Audit 2010-2012	Prior discrepancies	\$2,400,000	Reduction	\$68,000	Accepted - case closed
Totals			\$3,631,621		\$105,459	Average Reduction 97.10%

Offers in Compromise

Year Completed	Type of Tax Issue	Cause of the Problem	Initial Assessment of IRS	Results of Work Done	Payments Due from Taxpayer	Current Case Status
2008	Back Taxes (91-05)	TP Error	\$1,344,887	QC - 1	\$20,000	Accepted - case closed
2009	Back Taxes (97-06)	CPA error	\$647,000	QC-24	\$10,500	Accepted - case closed
2009	Back Taxes (00-06)	TP Error	\$65,000	QC-24	\$4,230	Accepted - case closed
2009	Back Taxes (01-08)	Employer Fraud	\$35,000	QC-24	\$3,750	Accepted - case closed
2009	Back Taxes (98-05)	CPA embezzlement	\$2,500,000	QC-24	\$48,500	Accepted - case closed
2010	Back Taxes (01-09)	TP Error	\$57,000	QC - 5	\$2,125	Accepted - case closed
2012	Back Taxes (01-10)	CPA error	\$297,442	QC - 2	\$13,000	Accepted - case closed
2012	Back Taxes (08)	TP Error	\$69,882	QC - 5	\$4,231	Accepted - case closed
2012	Back Taxes (08-09)	CPA error	\$32,254	QC - 5	\$350	Accepted - case closed
2012	Back Taxes (09-11)	CPA error	\$79,377	QC - 5	\$10,000	Accepted - case closed
2013	Back Taxes (07-12)	Employee Embezzlement	\$1,288,305	QC-24	\$283,427	Accepted - case closed
2013	Back Taxes (03-05)	TP Error	\$26,445	QC-24	\$10,445	Accepted - case closed
2014	Back Taxes (03-09))	TP Error	\$149,150	QC - 5	\$1,000	Accepted - case closed
2014	Back Taxes (10-13)	TP Error	\$2,412	QC - 1	\$20	Accepted - case closed
2015	Back Taxes (11-12)	CPA error	\$30,125	QC - 5	\$300	Accepted - pending payoff
2015	Back Taxes (03-11)	CPA error	\$1,052,044	QC - 5	\$130,000	Pending IRS Acceptance
2016	Back Taxes (13-15)	CPA error	\$640,000	QC - 1	\$7,945	Pending IRS Acceptance
2016	Back Taxes (13-15)	CPA error	\$96,000	QC - 1	\$1,390	Pending IRS Acceptance
Totals			\$8,412,323		\$551,213	Average Reduction 93.45%

Amended Returns

Year Completed	Type of Tax Issue	Cause of the Problem	Initial Assessment of IRS	Results of Work Done	Payments Due from Taxpayer	Current Case Status
2009	Overpaid 05-06	H&R Error	\$11,553	Refund	(\$147)	Accepted, Refund issued
2009	Overpaid 02-05	TP Error	\$11,640	Refund	(\$1,921)	Accepted, Refund issued
2010	Overbill of 09-10	Liberty Tax Errors	\$6,925	Full Reduction		Accepted - case closed
2011	Amend 2007	H&R Error	\$4,437	Reduction	\$82	Accepted - paid - case closed
2012	ETC issue 2010	IRS Error	\$457	Full Reduction		Accepted - case closed
2013	Amend 2009	Family Fraud	\$3,620	Refund	(\$5,240)	Accepted, Refund issued
2013	Amend 2011	TP Error	\$1,078	Refund	(\$468)	Accepted, Refund issued
2014	Amend 1998-2012	TP Error	\$171,761	Reduction	\$5,866	Accepted - paid - case closed
2014	Amend 2005-2012	TP failure	\$24,451	Reduction	\$2,325	Accepted - paid - case closed
2015	Amend 2007-2010	IRS Error	\$1,935	Refund	(\$575)	Accepted, Refund issued
Totals			\$237,857		(\$78)	Average Reduction 100.03%

Installment Arrangements

Year Completed	Type of Tax Issue	Cause of the Problem	Initial Assessment of IRS	Results of Work Done	Payments Due from Taxpayer	Current Case Status
2006	Audit Sales Tax (00-04)	Prior discrepancies	\$16,498	48 mo payout	\$344	Accepted - paid - case closed
2009	Back Taxes 04-06	TP failure	\$6,700	36 mo payout	\$186	Accepted - paid - case closed
2010	Audit 2007	Preparer Fraud	\$6,517	36 mo payout	\$181	Accepted - paid - case closed
2010	Audit Sales Tax (06-09)	Prior discrepancies	\$12,200	48 mo payout	\$254	Accepted - paid - case closed
2011	Back Taxes 2008-2010	TP failure	\$3,900	60 mo payout	\$55	Accepted - TP deceased - case closed
2011	Back Taxes 2006	Preparer Fraud	\$21,150	24 mo payout	\$800	Accepted - paid - case closed
2012	Back Taxes 2000-2002	TP failure	\$6,474	36 mo payout	\$180	Accepted - paid - case closed
2013	Back Taxes 2009-2012	TP failure	\$3,112	24 mo payout	\$150	Accepted - paid - case closed
2015	Back Taxes 2014	TP failure	\$1,493	18 mo payout	\$105	Accepted - pending payoff
Totals			\$78,044		\$2,255	Ave Mo Pmt to Debt Percentage 2.89%

Audits/ Examinations of Returns prepared by Individualized Systems

Year Completed	Type of Tax Issue	Cause of the Problem	Initial Assessment of IRS	Results of Work Done	Payments Due from Taxpayer	Current Case Status
2006	Audit Sales Tax (00-04)	Prior discrepancies	\$65,992	Reduction	\$16,498	Accepted - case closed
2009	Audit 2006	Random/Routine		No Change		Accepted - case closed
2009	Audit 2006	Random/Routine		No Change		Accepted - case closed
2011	Audit 2008	Random/Routine	\$13,177	No Change		Accepted - case closed
2011	Audit 2007	Random/Routine	\$13,457	Refund	(\$456)	Accepted - case closed
2011	Audit 2007	Random/Routine		No Change		Accepted - case closed
2012	Audit Sales Tax (08-12)	Random/Routine		No Change		Accepted - case closed
2013	Audit 8300 comp (12-13)	Random/Routine		No Change		Accepted - case closed
2013	Audit FR (11-12)	Unusual Activity	\$218,420	Back Pay	\$62	Accepted - case closed
2013	Audit-2009	Unusual Activity	\$4,035	No Change		Accepted - case closed
2014	Audit Sales Tax (010-14)	Random/Routine		No Change		Accepted - case closed
2016	Audit 2013	Random/Routine		No Change		Accepted - case closed
Totals			\$315,081		\$16,104	Ave Change to Return 5.11%

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