



Notices of Adjustment, Examination or Audit

Our office does not automatically get copied on any of your tax notices or letters from tax agencies. If you receive one, please let us know.

If you receive any notices of tax adjustments, examinations or audits from a tax authority relating to a tax return that we prepared, we will review your notice free of charge. We will also provide you with additional information or explanations related to the preparation of your tax return(s) should the tax authorities subsequently request it. Further assistance will be billable. Please note that in order to handle phone calls or in-person meetings with tax authorities on your behalf, we must have a completed and signed Form 2848. Authorization may take up to one week. In the meantime, we can assist with written correspondence and preparation for any meetings.

A notice of adjustment is generally issued if a possible error or omission is discovered on your tax return. This often happens due to the IRS's matching program, where third party information (e.g. from W-2's, etc.) doesn't agree with what is on your tax return. These notices frequently contain errors by the taxing authority, so if you receive one, we recommend emailing it to us for a quick review at no charge. Do not make any payment until we have reviewed the notice, as obtaining a full or partial refund can be time-consuming and difficult, even when you have a strong case.

If you need further advice in addressing the notice, we offer consulting at our current billing rates. Of course, if we have made an error, we will assist you at no charge.

Please be aware that any proposed adjustments by the examining agent are subject to certain rights of appeal.