YOUR IRS TAX PROBLEM, SOLVED.

Our Practice, Process, and What Comes Next.

MILESTONE TAX
SOLUTIONS

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You've hired us for one reason: to take control of your IRS situation.

That starts now.

Milestone Tax Solutions is staffed by experienced tax professionals who understand how the system works and how to navigate it strategically.

From this point forward:

* We handle communication with the IRS.
* We obtain and analyze your full IRS file.
* We develop a resolution strategy based on your actual financial reality.
* We provide peace of mind.

Here's the real talk: resolving tax debt is a legal process. It takes time. There are no shortcuts. But when handled properly, it is absolutely manageable.

Our job is to run the process efficiently and keep you informed so you're never left guessing.

We're ready to get to work.

Welcome to Milestone Tax Solutions.

BBB ACCREDITED BUSINESS

Our Practice and Process At-A-Glance

Onboarding & Communicaton with IRS

Day 1

File Review & Discovery

Day 5

Tax Profile Analysis

Day 10

Case Strategy & Planning

Day 15

Strategy Deployment

Day 20

Active Case Resolution

1-6 Months

Phase I: Understanding the Full Picture

Your case is now in motion. Phase I is where we step in, establish control, and gather the exact information needed to determine the smartest path forward.

Your Client Portal Invitation

You will receive access to your secure client portal. This is where we'll communicate, collect documents, and keep your case organized.

The portal allows you to:

- Upload requested documents safely
- Review important updates
- Review billing information
- Track progress in one place

If you haven't logged in yet, we strongly encourage you to do so. Early access helps us move quickly on your behalf.

Authorization to Represent You Before the IRS

Our first formal step is submitting a tax authorization to the IRS (Form 2848 or 8821, depending on your situation).

This authorization:

- Allows us to communicate directly with the IRS on your behalf
- Allows us to request your complete IRS master tax file
- Prevents you from having to navigate IRS calls alone

Once filed, the IRS is required to speak with us about your case. This is the moment we begin standing between you and the government.

Pulling & Reviewing Your IRS Master File

During this review, we conduct a strategic "temperature check" of your case. This gives us the same internal data the IRS uses when making collection decisions. We analyze:

Collection activity:

- How many attempts has the IRS made to collect?
- Are levies or liens pending?
- Has your account been escalated?

Pulling & Reviewing Your IRS Master File (Cont.)

Balance breakdown:

- What portion is tax, penalty, and interest?
- Are there opportunities for penalty relief?

Filing compliance status:

- Are any returns missing or flagged?

This is not guesswork. This is strategy. We do not recommend solutions until we see the complete picture.

Matching You With the Right Resolution Strategy

Once we understand:

- Your IRS profile
- Your income and expenses
- Your assets and liabilities
- Your hardship factors

We determine which resolution strategy gives you the strongest advantage.

This may include:

- Currently Not Collectible status
- An Affordable Installment Agreement
- An Offer in Compromise
- Penalty Abatement
- Or another strategic alternative

Every recommendation we make must align with both IRS guidelines and your real financial capacity.

Our role is to position you correctly, not just to "apply for something," but to apply for the right solution the first time.

What You Should Expect in Phase I

Phase I is all about getting answers. Once this phase is complete, we move into formal resolution negotiations with the IRS, armed with verified data and a defined strategy.

If you have not yet connected with us by phone, we invite you to schedule your welcome call at your earliest convenience. This ensures we answer your immediate questions and confirm we have everything needed to proceed without delay.

What Happens Next?

Now that representation has begun, our focus shifts to building your case the right way.

Phase I is where we gather, verify, and position. Every document we request and every step we take serves a strategic purpose. The IRS makes decisions based on verified financial data — not estimates — which is why your responsiveness during this stage is critical. The faster we receive what we need, the faster we can move with authority on your behalf.

There may be brief waiting periods while the IRS processes our authorization. That's normal. Behind the scenes, we are monitoring your file, reviewing transcripts, and preparing the groundwork for resolution.

We will not rush this stage. Precision here protects you later.

Once Phase I is complete, we move into Phase II — where we present your resolution options clearly, explain the pros and considerations of each, and execute a strategy designed to resolve your tax debt as efficiently and favorably as possible.

You've chosen professional representation for a reason. This is where that decision begins to work in your favor.

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