



Suggestions if You Get a Notice or Letter from the IRS

Each year, the IRS mails millions of notices and letters to taxpayers each year. If you do get a letter from the IRS, there is no need to panic. There are numerous reasons why the IRS might send you a notice. In many situations, you can resolve a notice simply by having your tax advisor respond to it. While getting mail from the IRS is not a cause for alarm, it should not be ignored either.

If you do receive an IRS letter or notice in the mail, here are some suggestions of what to do:

Read the letter carefully. Each notice deals with a specific issue and includes specific instructions on what to do. A notice may reference changes to a taxpayer's account, taxes owed, a payment request or a specific issue on a tax return. Taking timely action could minimize additional interest and penalty charges.

Review the information. If a letter is about a changed or corrected tax return, the taxpayer should review the information and compare it with the original return. If the taxpayer agrees, they should make notes about the corrections on their personal copy of the tax return and keep it for their records. Typically, a taxpayer will only need to act or contact the IRS if they don't agree with the information, if the IRS requested additional information, or if they have a balance due.

Take any requested action, including making a payment. The IRS and authorized private debt collection agencies do send letters by mail. Most of the time, all the taxpayer needs to do is read the letter carefully and take the appropriate action or **submit a payment**.

Reply only if instructed to do so. Taxpayers don't need to reply to a notice unless specifically told to do so. There is usually no need to call the IRS. If a taxpayer does need to call the IRS, they should use the number in the upper right-hand corner of the notice and have a copy of their tax return and letter.

Let the IRS know of a disputed notice. If a taxpayer doesn't agree with the IRS, they should

mail a letter explaining why they dispute the notice. They should send it to the address on the contact stub included with the notice. The taxpayer should include information and documents for the IRS to review when considering the dispute.

Keep the letter or notice for your records. Taxpayers should keep notices or letters they receive from the IRS. These include adjustment notices when an action is taken on the taxpayer's account. Taxpayers should keep records for three years from the date they filed the tax return.

Watch for scams. The IRS will **never** contact a taxpayer using social media or text message. The first contact from the IRS usually comes in the mail. Taxpayers who are unsure whether they owe money to the IRS can view their **tax account information** on [IRS.gov](https://www.irs.gov).

If you are unsure about anything, make a copy for your records and forward to your tax advisor to review. If your tax advisor does not agree with the notice, they will correspond with the IRS on your behalf. Your tax advisor may ask you to sign a power of attorney which gives the tax advisor permission to communicate with the IRS about your tax account. Once your tax advisor responds to the IRS, allow at least 30 days for a response.

You may also receive a notice from **astate taxing agency**. The same information applies, if unsure, send your notice to your tax advisor as soon as possible.

If you need to access your tax returns after receiving a notice, please know that your tax returns are available on our client portal. If you have not received an invitation to set up your password, please contact us at 201-262-1040. If you have set up your account, you can access it by going to [tfllc.com](https://www.tfgllc.com). The link to access is at the bottom of the page and is called “[Sharefile Login](#).” Click on the link to sign in. You can also upload any information or tax notices in the appropriate Tax Year "2022, 2023, etc." of your Portal Account. .

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201-262-1040
www.tfgllc.com



Traphagen CPAs & Wealth Advisors | 234 Kinderkamack Road, Oradell, NJ 07649

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