

# Managing Trouble with the IRS: Pro Tips

1. Stay calm.
2. Know that it might be them and not you.
3. Read your tax notice (CP 2000 letter or otherwise) carefully.
  - Follow all instructions.
4. Talk to the IRS; they're people.
5. Be organized and professional. Act confident and courteous.
6. Documentation is your friend.
  - Locate and organize all your paperwork.
7. Ask for help if you need it.
  - Hire an EA, CPA, or JD.
8. If it's your fault, pay what you owe.
  - Work out a payment plan if necessary.
9. If it's not your fault, don't give up.
  - Remember that the IRS moves slowly, but if you're right, you're right. Be patient.
10. Fix your systems so it doesn't happen again.

And always: Consult **IRS.gov** for good, clear, official information.

The above examples are not intended as legal advice but to illustrate certain retirement planning concepts. Always refer to your legal counsel or accountant when and as appropriate.

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