



**BAER**  
TAX GROUP

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**What to do if you get a letter or notice from the IRS or State Tax Department...Don't panic! Read this:**

Notices are sent for a variety of reasons such as needing to verify identity or information, refund is being adjusted, a balance is due, the refund is applied to another outstanding balance due or there is a delay in processing your return.

Carefully, read the notice or letter to see the tax type and period/year that is being referenced and which agency it is from. Some notices are just informational. Other notices will need a response and include a respond by date. Don't ignore any notice.

Notices can be asking for straight forward information such as providing a copy of W2's, proof of your health insurance or verifying your identity.

Other common notices are adjustments of refunds due to actual estimated taxes paid versus ones reported on returns. The most common discrepancy is the estimated tax that is paid in January being counted twice.

Notices can also come if you owe money and did not pay by April 15<sup>th</sup>. Even if you are on a valid extension, tax monies are DUE by April 15<sup>th</sup> so, an additional notice may be sent for interest and penalty on the amount due. Extensions are for the time to file the paperwork, not an extension to pay the tax money.

Also, it is very important to note, the IRS will NEVER call you on the phone. The people who call threatening you and claim they are from the IRS are ALL fraudulent, do not respond to them. The IRS always sends written correspondence to taxpayers.

Straight forward requests and informational notices can be resolved directly by the taxpayer. Any notices that are more complex can be brought, faxed or mailed to the office for our assistance in responding. If assistance is needed with the notice, this may incur a processing fee from Baer Tax Group, Inc. A phone call or email about the notice will not suffice in efficiently and accurately resolving the notice, the notice should be dropped off, faxed, mailed or emailed to the office, if assistance is needed

Thank you,

*Susan Baer*, CPA

Baer Tax Group, Inc.