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Dear Client,

We understand that receiving a notice can be stressful, but we are here to alleviate your concerns and guide you through the process. If you receive any communication or correspondence from a tax authority, it's important to take prompt action. Here are our recommendations:

Do Not Panic

It is not uncommon for taxpayers to receive notices and many of them can be resolved effortlessly. The notice may simply be a request for additional information, clarification, or confirmation of a particular item on your tax return.

Contact Us for Assistance

If the notice requires action or if you are unsure how to proceed, please reach out to our office immediately. We can help you review the notice, discuss your options, and assist with a response if needed. Please ensure that a complete copy of the notice is provided to the office.

Read the Notice Carefully

Notices can be issued for any year and may be regarding your federal, state, or local income tax return. Generally speaking, the notice contains detailed instructions on how to proceed with the issue at hand. The notice will provide important key information about the issue at hand. For example, the tax year in question, the amount owed (if any), and the specific actions required. Make sure to read the notice thoroughly to understand the matter at hand.

Check the Details

Verify that the information on the notice matches your tax return. Please ensure that your name, Social Security Number (or Taxpayer Identification Number), filing status, and other details are correct. If there are discrepancies, it is crucial that they be addressed. Not all notices received are issued to report an error but can be for clarification.

Deadlines

Notices typically include a deadline for responding or paying a balance due. It is important to be mindful of the deadline to avoid additional penalties, interest, or further action. We can help respond by the stated deadline and assist with requesting an extension or setting up a payment plan.

Keep Copies of all Correspondence

Be sure to keep a record of the notice you received, as well as any correspondence or documentation you may have. This will help us keep track of the progress of the matter and ensure that the issue is addressed properly.

In the Case of an Audit

If the notice involves an audit or a request for additional documentation, it is important to remain calm and organized. We will be more than happy to guide you through the process, aid in gathering all relevant documentation, and respond as needed.

Beware of Scams

Please remember that tax authorities will never contact you by phone, email, or text message. If you receive this type of communication, it may be a scam. Always verify the legitimacy of the notice before responding and, if you are unsure, please contact our office.

We are here to provide support and want to ensure that your tax matters are handled efficiently and accurately. If you have received a notice or need assistance with any tax notice, don't hesitate to contact us at (717) 249-5321.

Please keep in mind that in recent years, we have been inundated with erroneous notices from federal, state, and local tax authorities. We stand behind our work and will never charge for a response if it is a result of our mistake. However, like most offices, we charge a fee for responses resulting from client and/or tax authority errors.

Thank you for trusting us with your tax and accounting needs. We look forward to assisting you.

Sincerely,

Cohick & Associates