

IRS NOTICES & CORRECTIONS GUIDE

WHAT TO DO, WHAT TO EXPECT, & HOW INFINITY SUPPORTS YOU

At Infinity Tax & Financial Planning, we believe our clients deserve clarity, confidence, and expert guidance—especially when an unexpected IRS or state notice arrives. Our goal is to remove confusion, reduce stress, and give you a clear path forward using a process rooted in transparency and support.

If You Receive an IRS or State Notice

Receiving a letter from the IRS or your state tax agency can feel stressful—but most are routine, informational, or easily corrected. The most important thing you can do is act quickly and involve us immediately.

Please follow these steps:

1. Upload the notice (all pages - front and back) to us via
 - Email at info@infinitytaxandfinancial.com or
 - Your secure Intuit Link or
 - Your SmartVault portal.
2. Notify our office so we can begin reviewing it.
 - This ensures we track timelines and respond before deadlines.
3. Do not call the IRS or make any payments before we review the notice.
 - Many notices are incorrect, automated, or easily resolved.

Infinity is here to make this process simple, supported, and transparent.

Timeline Expectations

IRS notices move on strict timelines. Here is the typical process:

•Response Window:

Most notices allow 30 days for reply. We prioritize these as time-sensitive.

•Resolution Time:

Once a response is sent, the IRS generally takes 6-12 weeks to process corrections.

•Additional Letters:

Follow-up letters do not necessarily indicate a problem. Often, they simply confirm receipt or require clarification.

Infinity will walk you through every step so you always know what's happening, why it matters, and what comes next.

How Infinity Assists You

We provide comprehensive support to help you navigate notice resolution confidently and clearly.

Included at No Cost:

- Initial Notice Review

We analyze the letter, determine whether it is correct or erroneous, and outline next steps.

- Audit Consultation (Initial)

We provide a free 15-minute consultation to review the scope of the issue and discuss the appropriate next actions.

- Guidance & Recommendations

We explain the notice in plain English and advise you on what to expect moving forward.

Additional Services (If Needed)

If the notice requires a formal response or representation, we offer full professional support:

- Formal IRS or State Letter Response

We prepare a detailed, compliant response on your behalf to correct the issue or dispute findings.

- Audit or Examination Representation

If the IRS requests additional information or selects you for audit, we provide:

- Full communication with IRS/state authorities
- Document gathering and preparation
- Explanation and substantiation of tax positions
- Ongoing representation until the issue is resolved

Authorization Requirements

Before we contact the IRS on your behalf, we will provide the appropriate authorization form (Form 8821 or 2848). You will receive this electronically through your secure portal for signature.

Infinity Summary & Promise

When a tax notice arrives, you deserve a partner who brings clarity, support, and confidence into the process.

At Infinity, we promise to:

- Provide a clear explanation of what the notice means
- Offer transparent, proactive guidance
- Resolve issues with professionalism and urgency
- Stand beside you through notice corrections or audit needs

If you have received a notice, please upload it to your portal and contact our office. We are here to protect, guide, and empower you every step of the way.