



## Learn Six Questions to Ask Before Hiring A Tax Attorney

### Description

So you've finally discovered a tax attorney you're interested in employing and have set up an initial consultation. You have probably never met with a tax attorney in this context and have no idea what to anticipate. That is OK.



Begin by taking a look around the office. Is it tidy and clean? Well-decorated? When you walk in, are you greeted? These items may appear insignificant, but in tax affairs, attention to detail is critical, and these could be indicators that such attention is lacking.

Before you employ a tax attorney, consider asking the following seven questions when you meet with them:

## **#1: What percentage of your practice is devoted to resolving tax issues?**

This is a definite technique to distinguish between dedicated tax controversy practices and generic ones. The dedicated tax controversy practice will devote a significant portion, if not the entirety, of their practice to tax controversy and tax debt relief issues. This is the person you want in charge of your case.

## **#2: Who will be working on my case? Are you a lawyer, a CPA, or an estate planner?**

This is a vital question, especially if you are working with larger corporations or tax debt relief firms. In most of these cases, the person you meet with for the first consultation will not be the person who eventually handles your case on a day-to-day basis. Instead, that assignment will be sent to someone else in the firm, who will likely have a lower credential and experience than the individual you're dealing with today. This is similar to the bait-and-switch strategies in Beware of Tax Debt Relief Scams. So, if your case is delegated to someone else in the firm, make sure that person is well-credentialed and experienced. You don't want to hire a tax attorney, but you want an enrolled agent to work on your case.

On the other hand, small businesses and lone tax attorneys are less prone to experience this. When you meet with one of these, the person you meet with is extremely likely to be the person who will manage your case from here on out. But be cautious – even solo practitioners may have paralegals handling part of their cases, so you should inquire nonetheless.

## **#3 Do you provide a 100% satisfaction guarantee?**

First, keep in mind that you are requesting a satisfaction guarantee rather than a guarantee of the outcome. A true tax attorney will never guarantee a certain outcome in your case. They may, however, provide a 100% satisfaction guarantee on their services. This would allow you to receive a refund of your costs if they grow uninterested in your case, fail to interact with you regularly, or otherwise fail to meet your expectations. We'll warn you right away: not many tax specialists provide such a guarantee, but it's worth looking for one who does.

## **#4 What method do you use to bill for your services?**

Most individuals find this a difficult issue to broach. However, you could be looking at fees in the thousands of dollars, so make sure you understand how such fees will be incurred. Here are a few more direct questions to consider:

Do you charge a flat rate? If so, what is and isn't included in the fixed fee?

Do you charge by the hour? If so, how much do you charge per hour?

Do you require an initial retainer? If so, is there any portion of it that is nonrefundable? (If the retainer is nonrefundable, leave immediately) Do you charge for incidental charges such as copying and postage?

Do you charge for administrative expenses? If this is the case, how are the costs calculated?

## **#5 How will you keep me updated on the status of my case?**

This is a significant question. Because terrible tax attorneys are renowned for poor client communication, you should ensure that the professional you're meeting with has a defined policy for interacting with clients. For example, they should state that he or they will provide you with monthly updates and that they will always reply to client phone calls or emails within 24 hours.

## **#6 What motivates you to work in this field?**

Technically, there is no correct answer to this question. Still, it will provide valuable insight into the type of tax attorney you are considering hiring and their approach to tax controversy work. Most people will be caught off guard by this question and will dither for an answer. However, the good ones will be ready to inform you that the tax controversy allows them to assist someone going through one of the most difficult times of their lives. Unlike tax preparation or tax planning, tax controversy (particularly tax debt relief) includes alleviating the agony of real individuals. We've seen adult men sob like infants in our office because of the strain tax debt put on their marital and family lives. Helping these folks get rid of their tax obligation is a noble endeavor, and anyone who ignores that link and only does it for the money will not be interested in your case.

## **In conclusion**

Avoiding bad tax debt relief services is challenging, but asking the following questions can help you determine if the individual you're speaking with runs a legitimate firm.

### **Category**

1. Lifestyle

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