



Achieve Financial Freedom

Make Tax Problems A Thing of the Past



Optima Tax Relief uses its expertise to resolve your tax issues and let you move on with your life.

The following are some reasons why you should let Optima Tax Relief represent you:

Depth of Experience

Our tax team has over 25 years of experience representing clients to the IRS, so there is little we have not seen. Whether you are facing a large collection action or it is a simple back tax filing, we can assist you in putting this situation behind you once and for all.

Achieve Optimal Results

At Optima Tax Relief, our goal is to position your case to qualify for the best resolution available. We help structure a payment option that works best for your budget and pays off any tax debt in a timely manner, minimizing the accumulation of interest. Our team is trained to make the most out of every Resolution given the guidelines that are in place.

Client Friendly Process

Unlike many firms, Optima Tax Relief will conduct a complete investigation into your specific tax situation prior to enrolling you into our Resolution Program. OTR will earn your business during the Investigation phase and determine whether or not we can provide a beneficial solution before you pay any fees towards the Resolution phase.

Superior Customer Service

You will have a designated Case Manager and the support of our first class customer service team. At Optima Tax Relief, our clients are our first priority and you will always have access to our representatives and the status of your case. We limit our assigned caseloads so a high quality of work can be sustained and you will always know the status of your case.

"I can't express the relief and comfort that I feel about your handling of my tax issue. I am very thankful to the person that referred me to you!"

- T. Anderson

For a free consultation call **800-536-0734** or visit **optimataxrelief.com**

Your Options

There are several resolutions available for people who have tax problems. Optima Tax Relief will review your case in our Investigation Phase to best qualify you for the options available in your specific case. Upon completion of your investigation, we will provide an overview of the options available. Some of the possible resolutions could include:

Back Tax Filing and Compliance

We find that taxpayers do not file tax returns for one or more years for various reasons and the problem can become overwhelming. Fortunately, there are ways to approach the problem of unfiled returns. The IRS maintains Master File Transcripts that Optima Tax Relief will access and review on your behalf, including any substitute returns the IRS has filed. We will assist in re-filing your returns, and our subsequent negotiations will be based on our more favorable returns for your benefit. Also, if returns have not been filed in the most recent three tax years, those returns should be prepared immediately in order to claim any refunds that may be due.

Offer in Compromise (OIC)

This program requires special circumstances but allows taxpayers to settle their entire tax debt for a lower amount based entirely on what they can afford to pay. It requires full disclosure of all household income and expenses and an analysis of net equity in assets. An OIC for an individual taxpayer typically takes one month to prepare and six months for the IRS to process and accept. An OIC for a self-employed or corporate taxpayer typically takes about two months to prepare and anywhere from nine months to over a year for the IRS to process. These time frames are subject to change based on the time of year, and IRS staffing.

Penalty Abatement

In many tax debt cases the penalty and interest portion of the tax debt is quite significant. Most frequently, abatement refers to eliminating an assessed tax liability and an adjustment references reducing or altering an assessed tax liability. If there is a reasonable cause for abatement or adjustment, the IRS may be willing to review the penalties which created a tax liability.

Currently Non-Collectible (CNC)

Currently Non-Collectible (CNC) status is a determination by IRS Collections personnel to suspend collections due to economic hardship. The IRS agrees to suspend collections, such as refraining from issuing a wage garnishment or bank levy, so long as the taxpayer's income remains at the same level as when the CNC status was approved and the taxpayer files and pays taxes on time each year.

State Tax Representation

In many cases, state tax collection authorities can be more aggressive and act before the IRS takes action. Typically, those who owe the IRS, also end up owing state tax. State tax collection authorities have tremendous reach and can cause financial hardship if not dealt with in a timely manner. Unlike much of our competition, Optima Tax Relief represents many clients with state tax Issues and resolves them successfully.

"We continue to use Optima's services because they are competent in many different aspects of my taxes, including my personal taxes and also a business partnership."

- Christina

#1 Optima Tax Solution:

The Optima Resolution Program



Optima Tax Relief's Two Phase Resolution Program Benefits our Clients:

Investigation Phase – During the investigation phase, we establish our representation of your case with the IRS and appropriate tax agencies. If the file has any pressing collection issues, we have an Immediate Action team that specializes in this area. During this phase, we request and gather all pertinent information to build a good case. This information will include your IRS Master transcript, state tax status, collection status and financial budget information. Upon receiving all the necessary items, our professionals evaluate the information for the best possible Resolution options.

Resolution Phase – In this phase, our team works to achieve the optimal solution for your situation. OTR will prepare the appropriate proposals for the IRS and other tax agencies. In addition, we also make sure your past tax filings are prepared and compliant. Your assigned Case Manager will be in touch with you regarding all information we need to ensure the best possible result. When we are ready to finalize a proposal with the relevant tax agencies, we will review it with you, and ensure that you are pleased with our results.

Comparison Chart

Weigh Your Options: If you owe \$25,000, you may actually pay...

"Getting this matter resolved was very important to me. Your services provided me with relief and comfort."

- Tessa

\$31,138*

\$25,000

\$3,056**

Installment Agreement

Pay Debt in Full

Offer in Compromise

*Based on 5 year payment plan and 9% IRS Interest Rate

**Source: IRS Data Book 2003. Special circumstances are required for one to qualify for Offer in Compromise resolution.

+Testimonials may not be representative of typical results and may reference affiliates that OTR works with to service clients. Individual results will vary based on one's circumstances and ability to provide accurate and timely information



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Frequently Asked Questions

WHAT IS TAX RELIEF AND HOW DO I QUALIFY?

Tax Relief is a program that the IRS put into practice years ago to allow taxpayers to potentially settle tax debts for a percentage of what is owed. Tax Relief is available on different levels depending on your specific tax situation. While the IRS does not openly promote these programs, Optima Tax Relief specializes in finding the best possible solution for those who qualify.

HOW LONG DOES THIS PROCESS TAKE?

Every Tax case has its specific challenge and procedures. In most cases, the process takes anywhere from 2 to 6 months to resolve. Once we determine how complex your tax issue is, we will be better able to determine your case timeline. Our goal at Optima Tax Relief is to achieve the best possible result regarding your specific tax situation in the quickest possible way.

HOW LONG WILL IT TAKE OPTIMA TAX RELIEF TO GET INVOLVED?

Optima Tax Relief will get involved the moment you become a client. In most cases, our clients wait until the last moment or have exhausted all other resources. Whether that is a wage garnishment, bank levy, aggressive phone calls, or collection letters, we begin providing assistance on your behalf and work on resolving the specifics of your case as soon as you enroll in our program.

HOW MUCH WILL I SAVE?

Each individual case is unique and we may not be able to save you anything at all. We can evaluate your case, determine if you will qualify as a client and help determine if we can save you money. For those that qualify, we have typically been successful in saving our clients money on their tax debt as well as settling cases for a fraction of the amount owed.

HOW DO I GET STARTED?

Call one of our Tax Specialists today for a free, no obligation consultation. We will determine whether we can represent you and work on guiding you to the best possible tax solution for your specific case. If you choose to become a client, we will start working immediately on your case to help resolve your tax issue the quickest and most effective way possible.

"Our firm received a delinquent tax notice from the State of California involving activity from several years ago. I contacted the Professionals at Optima Tax and they were able to identify the error and clear it up in a matter of days."

- Conor