

August 2016 – Client Testimonial

“All people have flaws. Sometimes we make really poor decisions. Regardless of whether it’s due to inattentiveness, a lapse in sound judgment, self-deception or any combination of reasons, these decisions can have significant and serious consequences. I allowed myself to make a series of bad (perhaps even ridiculous) choices. I fell behind paying my federal taxes. Year one, just a little bit. Year two, a little more. It continued for several more years, with many hundreds of thousands of dollars in taxes well past due, and additional accruing interest and assessed penalties. At first, my “friends” at the IRS seemed not to care all that much. Once, or sometimes twice, a year they would send polite letters demanding payment. While the IRS’ letters contained threats of enforcement actions, after a while those threats rang hollow as no steps were ever taken. Until . . .

In early February an IRS revenue officer showed up at my office. She was polite, but deadly serious and all business. She wanted to know why I hadn’t paid my taxes and told me the IRS was coming after me with full force. She advised that tax liens would be filed within days, that she intended to find my wife (a joint-filer, who had no idea that I had been delinquent in paying our taxes) to discuss the matter with her, she advised that we needed to move into a cheaper apartment, and delivered other scary warnings and promises. She did advise that as taxpayers we have certain statutory and regulatory rights, and suggested we speak to an attorney.

I called my accountant and told him what transpired. Without any hesitation, he told me that I needed to call Marty Davidoff. I called Marty’s office and spent 15 minutes speaking with his assistant. She was wonderfully reassuring, letting me know I was hardly the first person in that situation. She was also incredibly organized, had a list of questions and told me what documents Marty and his team would need to see. When that call was completed I held some hope that there could be a solution. (I should add, now six months later, I remain very impressed with Marty’s entire team. His staff is very attentive, detailed oriented and client focused.)

Within an hour of my initial phone call Marty called me back for an introductory call. He described his professional experience as a tax attorney (very impressive), what his initial expectations were and made clear that he would advocate for us and that it could be possible to achieve a resolution without the draconian consequences that had been suggested. Beyond merely demonstrating that from a legal perspective he was the right attorney, Marty was compassionate. He clearly understood that I was hurting, and that my wife would need a lawyer to not only provide expert legal strategy, but a fair serving of humanity and TLC. True to that call, Marty (and his entire team) have demonstrated those qualities throughout our relationship.

We had our first meeting a few days later, my wife and I, and Marty and his associate, Andrew Paradis. Marty and Andrew expertly walked us through the situation, analyzing and discussing our tax liability, our income and assets. They walked us through various rights that taxpayers, even delinquent ones, have. When we did not understand things, they took the time to explain them again. They reassured us that there was a way to work through this, not necessarily an easy one, but certainly

an achievable one. To their credit, while they assured us we could work this out, they never overpromised. And they never said something that was not true just because they thought we wanted to hear it. The two Es – Excellent and Ethical. We left that initial meeting with a tentative plan. Marty and Andrew would engage with the IRS Revenue Officer, and demonstrate our commitment to making things right over time. They also had a backup plan, preserving various of our rights in case our initial plan did not work out. In any event, within days they had developed a positive working relationship with our case manager – while my wife and I were ecstatic, my impression is that it seemed like business as usual for Marty and Andrew. I now understand the reason – and that is because this is what they routinely do, and they are expert at it.

One of the things we were required to do was provide full financial disclosure to the IRS. I am told (and have read) that this can be a difficult process, and when not done properly it can lead to mistrust and other problems with the IRS. We had no such problems. Marty and Andrew walked us through the process making it easy for us to understand what information we needed to provide. After that, Marty's team compiled a very professional submission for the IRS. Indeed, part of the process of resolving these matters is building bridges between the tax payer and the IRS. Professional submissions like these are no doubt very helpful in achieving this goal.

Armed with lots of information we had provided them with (including full financial disclosure to the IRS), by our second meeting Marty and Andrew had developed a strategy for a six year payment plan (what is commonly referred to as an installment agreement). While I don't wish to discuss the details of the plan, my wife and I were very pleased with it. It is achievable and realistic, and provide us a chance to both pay our liability and continue to live a comfortable life. The IRS accepted our proposed deal. I firmly believe that the relationship Marty and Andrew established with the IRS contributed significantly to the IRS' acceptance of our proposal.

We have had a number of minor issues arise since our plan was accepted. Marty and Andrew have been very attentive. They are problem solvers. We are on a great path and have my full confidence.

I have never posted a review of a business or service provider before on the internet, but I feel compelled to now. I have not told many of my friends about our tax issues – it's just too personal and embarrassing. But the rub is that we were so pleased with the services Marty, Andrew and their team provided to us – I would love to be able to recommend them to others facing tax problems. So if I can't tell my friends, perhaps with this post I can tell others so that they can be helped the way we were. Good luck, and call Marty!!”