CONTACT MBA FINANCIAL Tax & Accounting

IRS and State Tax Resolution | Tax Preparation & Planning | Accounting | Debt-to-Wealth Strategies

Get Tax Debt Wise Before the Pressure Gets Worse

Speak with a tax professional. Send confidential documents securely. Keep every deadline visible.

CALL OR TEXT

Local: (989) 686-NO DEBT (6633)

Toll-Free: (877) 306-2246

Urgent notices and collection activity: call first.

EMAIL

Document Submissions and Administrative Support Staff:

admin@betaxdebtfree.com or contact us at www.taxdebtwise.com

Use email for general communication and scheduling.

SECURE CLIENT PORTAL

Use for tax returns, notices, transcripts, statements, identification, and other confidential documents.

mbafinancial.logicsportal.com

WEBSITE & STRATEGY SESSION

Visit TaxDebtWise.com for services, resources, FAQs, Tax Resolution Strategy Sessions, and Debt-to-Wealth planning.

FAX & MAIL / DOCUMENT DELIVERY

Fax: (989) 364-2024

4106 E Wilder Rd, Ste 288

Bay City, MI 48706

Use tracking for deadline-sensitive mail.

OFFICE HOURS

Monday-Friday: 8:00 a.m.-7:00 p.m.

Saturday: 10:00 a.m.-4:00 p.m. | Closed Sunday

Call or text 24/7. Leave a message after hours.

CALL IMMEDIATELY FOR URGENT DEADLINES

Call first if you received a Final Notice, levy, garnishment, lien, audit or examination request, appeal or hearing notice, court date, threatened seizure, or any response deadline within 14 days.

PROTECT YOUR INFORMATION

Do not email or place full Social Security numbers, dates of birth, bank-account numbers, passwords, or tax documents on a public form. Use the secure client portal.

INITIAL CONTACT INFORMATION

Complete what you know. Our Investigation Analysis will update us.

Do not enter Social Security numbers, bank information, or passwords.

Complete before your first conversation or upload through the secure client portal. Submitting does not create an engagement.

YOUR CONTACT INFORMATION

First Name * / Last Name *

Email Address *

Best Phone Number *

State / Best Time to Contact

Preferred Contact: ☐ Call ☐ Text ☐ Email

Seeking Help As: ☐ Individual ☐ Business Owner ☐ Both

Currently Represented? By Whom?

SERVICE & ACCOUNT INFORMATION

Primary Service Needed

☐ Tax Preparation / Planning
☐ IRS / State Tax Resolution
☐ Accounting / Bookkeeping
☐ Debt Reduction / Debt-to-Wealth

Matter Involves

☐ IRS ☐ State Tax Authority
☐ Creditor / Collections ☐ Not Sure

Tax Years / Accounting Periods / Debts Involved

Approximate Amount Owed, Disputed, or Total Debt

All Required Returns Filed? ☐ Yes ☐ No ☐ Not Sure

Missing Years, if Known

NOTICE, DEADLINE & URGENCY

Notice Received? ☐ Yes ☐ No

Agency / Creditor / Notice Number

Response Date or Deadline

Urgent Activity

☐ Levy / Garnishment ☐ Lien
☐ Audit / Exam ☐ Appeal / Hearing
☐ Court Action

Briefly Describe the Help You Need

☐ I understand not to include highly sensitive information.

RETURN OR DISCUSS THIS SHEET

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