MBA FINANCIAL

TAX & ACCOUNTING LLC

Clarity. Strategy. Resolution. A Better Financial Future.

Helping taxpayers, families and business owners understand the facts, solve tax and financial problems, and move forward with a practical plan.

TAX RESOLUTION	TAX & ACCOUNTING	IRS REPRESENTATION	DEBT-TO-WEALTH PLANNING

FOR CLIENTS **Start with a confidential strategy conversation.**

Call (989) 686-NO DEbt (6633) | Toll-Free (877) 306-2246

FOR PROFESSIONALS **Help us serve more people across America.**

Tax Analysts | Tax Professionals | Client Support | Bookkeeping | Business Development

Put a tax professional between you and the IRS.

Scan to learn more, download free action planners, or begin your next step at TaxDebtWise.com.

OUR PURPOSE

Why MBA Financial Exists

Financial problems get harder when people do not know what is true, what matters first, or what to do next. Our job is to replace confusion with facts, structure and a practical path forward.

People do not need another promise. They need a plan.

MBA Financial begins by understanding the account, the records, the deadlines, the financial picture and the client's goals before recommending a resolution. We believe the right solution starts with the right facts.

WHO WE HELP

- Individuals and families receiving IRS or state notices
- Taxpayers with back taxes, unfiled returns, liens, levies or wage pressure
- Self-employed individuals and business owners with complex tax records
- People who need accurate tax preparation, prior-year cleanup or accounting support
- Households overwhelmed by credit cards, loans and cash-flow pressure
- People who want a structured debt-reduction and wealth-building plan
- Clients who want year-round guidance instead of once-a-year tax preparation
- Businesses that need better records, bookkeeping and financial organization

WHAT CLIENTS SHOULD EXPECT FROM US

- Plain-English explanations before major decisions are made.
- A documented process rather than a one-size-fits-all sales pitch.
- Clear requests for the records and information actually needed.
- Professional fees and scope explained before additional work begins.
- Respect for confidentiality, deadlines and the seriousness of tax and financial stress.

A FOUNDATION OF EXPERIENCE AND ACCOUNTABILITY

30+	A+	YEAR-ROUND
YEARS IN BUSINESS	BBB RATING	GUIDANCE & SUPPORT

OUR SERVICES

What We Do

MBA Financial connects tax resolution, tax preparation, accounting and debt strategy so clients can address today's problem without losing sight of tomorrow's financial stability.

1

Tax Resolution & Representation

Back taxes, IRS notices, liens, levies, wage garnishment concerns, payment-plan analysis, penalty issues, audits/examinations, Offer in Compromise evaluation, collection alternatives and related representation when properly engaged and authorized.

2

Tax Preparation & Compliance

Federal and applicable state returns for individuals, families, self-employed taxpayers and business owners, including prior-year returns, amended returns, Schedule C, S corporations, partnerships and related owner returns.

3

Accounting & Financial Organization

Bookkeeping support, record reconstruction, income-and-expense organization, bank and credit-card review, business financial summaries and the cleanup work needed before accurate tax preparation or resolution.

4

Debt Reduction & Financial Strategy

A broader look at credit cards, loans, mortgages, HELOCs, vehicle debt, tax debt and household cash flow - then a practical strategy designed to shorten the payoff path, reduce wasted interest where possible and redirect future cash flow toward savings and wealth.

The goal is not simply to "sell a program."

A payment plan, Offer in Compromise, hardship status, penalty request, compliance project or debt strategy can be useful only when it fits the facts. MBA Financial's approach is to understand the complete picture before choosing the path.

COMMON PROBLEMS WE HELP ORGANIZE

Tax liens • Tax levies • Unfiled returns • IRS audits • Back taxes • Payment plans • Penalty concerns • Business tax compliance • Bookkeeping cleanup • Personal debt pressure

OUR METHOD

From Pressure to a Practical Plan

The MBA Financial process is designed to slow down the guesswork - not the response. We identify the urgent deadlines first, then work through the case in an organized sequence.

1 DISCOVER	**Understand what is actually happening.** We listen, review notices and available records, identify tax years and entities, obtain available account information when authorized, and separate urgent deadlines from issues that can be handled methodically.
2 STRATEGIZE	**Build the right plan from the verified facts.** We determine what compliance work is required, review income, expenses, assets and liabilities when relevant, compare available options, and explain the recommended path in clear language.
3 RESOLVE	**Execute, communicate and document the next steps.** We prepare the required work, communicate with taxing authorities when engaged and authorized, pursue the selected resolution, and keep the client informed of what has happened and what comes next.
4 STAY AHEAD	**Protect the progress after the immediate problem is addressed.** We encourage year-round tax planning, better records, realistic estimated payments, cash-flow awareness and debt-reduction strategies so today's resolution can become a stronger financial future.

OUR THREE-PHASE TAX RESOLUTION FRAMEWORK

PHASE I - INVESTIGATION	PHASE II - COMPLIANCE	PHASE III - RESOLUTION
Find the facts, accounts, years, deadlines and available options.	Complete missing returns, bookkeeping, records and financial information required to move forward.	Pursue the appropriate collection or representation strategy based on the verified case.

No legitimate professional can guarantee an IRS, state or financial outcome.

What we can promise is a disciplined process: understand the facts, explain the options, prepare the work carefully, communicate clearly, and pursue the agreed strategy professionally.

GROW WITH US

Help More People. Build Meaningful Professional Work.

MBA Financial is building a larger team because there are more taxpayers, families and business owners who need patient, organized and ethical help than any one professional can serve alone.

WE ARE INTERESTED IN PEOPLE WHO CAN HELP US DO THIS WORK WELL

Tax Analysts & Client Intake

Listen well, identify the real issue, gather complete information, explain the next step and help clients move from uncertainty to an organized engagement.

Tax & Accounting Professionals

Prepare accurate work, review records, support compliance projects and help turn complicated tax information into clear client decisions.

Bookkeeping & Case Support

Organize documents, reconcile records, build workpapers, maintain case activity and help keep deadlines, authorizations and client requests moving.

Business Development & Outreach

Start helpful conversations, educate prospects about the MBA Financial process and connect qualified people with the right professional - without making promises that the facts cannot support.

WHAT WE VALUE

Integrity Do not promise what has not been verified.	**Empathy** Treat financial stress as serious and personal.	**Follow-through** Document the case and complete the next step.
Coachability Use the process, training and feedback.	**Communication** Explain clearly and keep people informed.	**Growth Mindset** Learn tax, accounting and client-service systems continuously.

Think you could help people succeed here?

Send a short introduction, your resume or professional background, the role that interests you, and your availability to Admin@BeTaxDebtFree.com. Tell us what you are best at and why this kind of work matters to you.

Opportunities and compensation vary by role. Employee and/or independent-contractor arrangements, where offered, are subject to eligibility, written terms, required tax documentation and applicable law.

YOUR NEXT STEP

Whether You Need Help - or Want to Help Others - Start Here

One conversation can turn a pile of notices, records, bills or unanswered questions into a clear list of next actions.

IF YOU NEED TAX, ACCOUNTING OR DEBT HELP

Bring the notice. Bring the questions. Bring whatever records you have today. You do not have to solve the entire problem before asking for help.

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

Toll-Free: (877) 306-2246

Document Support: Support@BeTaxDebtFree.com

Website: www.TaxDebtWise.com

CTA: Schedule a confidential strategy session and find out what should happen next.

SCAN TO START

IF YOU WANT TO JOIN MBA FINANCIAL

If you are organized, coachable, comfortable talking with people about serious financial problems, and motivated by work that has a clear purpose, we want to hear from you.

Hiring / Team Inquiries: Admin@BeTaxDebtFree.com

Send: resume or professional background + role of interest + availability + best contact information.

CTA: Introduce yourself today. The next person we help may be waiting for someone with your skills.

MBA FINANCIAL TAX & ACCOUNTING LLC

Tax Resolution • Accounting • IRS Representation • Tax Preparation • Debt-to-Wealth Planning

Monday-Friday 8:00 a.m.-7:00 p.m. | Saturday 10:00 a.m.-4:00 p.m. | Call or text 24/7

Locally rooted. Professionally focused. Expanding our ability to help people across America.

Important: Services and representation depend on the facts, engagement terms, professional authorization, applicable federal and state law, and jurisdiction. No tax settlement, collection result, debt reduction, savings, credit improvement, investment return or other financial outcome is guaranteed. This introduction is general information and is not legal, tax or financial advice for a specific person.