



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 Support: support@betaxdebtfree.com Administration: admin@betaxdebtfree.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.

www.TaxDebtWise.com | (989) 686-NO DEBT (6633) | Current as of July 10, 2026





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	SERVICE & ACCOUNT INFORMATION	NOTICE, DEADLINE & URGENCY
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?	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 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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Current as of July 10, 2026 | MBA Financial Tax & Accounting LLC | Here to Help Secure Your Future

