WHY MBA FINANCIAL EXISTS

People Need a Plan - Not Another Promise

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.

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

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 tax preparation, prior-year cleanup or accounting support
- Households seeking a structured debt-reduction and wealth-building plan
- Businesses needing better records, bookkeeping and financial organization

WHAT CLIENTS SHOULD EXPECT

- Plain-English explanations before major decisions are made
- A documented process - not 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

YOUR NEXT STEP

Ready for a Clear Next Step?

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. One conversation can turn unanswered questions into a clear list of next actions.

START WITH A CONFIDENTIAL STRATEGY CONVERSATION

Local: (989) 686-NO DEbt (6633)
Toll-Free: (877) 306-2246
Support@BeTaxDebtFree.com
www.TaxDebtWise.com

SCAN TO START

GROW WITH US

Tax Analysts • Tax Professionals • Client Support • Bookkeeping • Business Development
Hiring / Team Inquiries: Admin@BeTaxDebtFree.com

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

Services depend on the facts, engagement terms, professional authorization, applicable law and jurisdiction. No tax settlement, collection result, debt reduction, savings, credit improvement, investment return or other financial outcome is guaranteed. General information only.

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

Put a tax professional between you and the IRS.

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(989) 686-6633 | (877) 306-2246
TaxDebtWise.com

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

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 and collection alternatives.

2

Tax Preparation & Compliance

Federal and applicable state returns for individuals, families, self-employed taxpayers and business owners, including prior-year, amended, Schedule C, S corporation and partnership returns.

3

Accounting & Financial Organization

Bookkeeping support, record reconstruction, income-and-expense organization, bank and credit-card review, business summaries and cleanup needed for accurate tax work.

4

Debt Reduction & Financial Strategy

A broader look at tax debt, credit cards, loans, mortgages, HELOCs, vehicles and household cash flow - then a practical strategy to shorten the payoff path and redirect future cash flow.

OUR METHOD

From Pressure to a Practical Plan

We identify urgent deadlines first, then work through the case in an organized sequence.

1 DISCOVER

Understand what is actually happening.

Review notices and 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 verified facts.

Determine required compliance work, review income, expenses, assets and liabilities when relevant, compare available options, and explain the recommended path clearly.

3 RESOLVE

Execute, communicate and document the next steps.

Prepare the required work, communicate with taxing authorities when engaged and authorized, pursue the selected resolution, and keep the client informed.

4 STAY AHEAD

Protect the progress after the immediate problem.

Encourage year-round planning, better records, realistic estimated payments, cash-flow awareness and debt-reduction strategies.

A disciplined process matters.

Understand the facts. Explain the options. Prepare carefully. Communicate clearly. Pursue the agreed strategy professionally.

TAX RESOLUTION

Our Three-Phase Framework

A tax resolution should be selected after the account, compliance requirements and financial facts are understood - not before.

PHASE I - INVESTIGATION

Find the facts, accounts, years, deadlines and available options.

PHASE II - COMPLIANCE

Complete missing returns, bookkeeping, records and financial information required to move forward.

PHASE III - RESOLUTION

Pursue the appropriate collection or representation strategy based on th verified case.

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

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

What we can promise is a disciplined process built around verified facts, clear explanations and professional follow-through.

LET'S FIND OUT WHAT SHOULD HAPPEN NEXT.

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