



Tax Rep Network

# Eric Green's IRS Templates

## What's Inside:

- ▶ IRS Collection and IRS Audit Folder Structures
- ▶ Library of Templates (Letters, Waivers, Checklists)

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Founder, Tax Rep Network



# Productivity-Boosting IRS Folder Structures



Streamline client onboarding and boost productivity with attorney Eric Green's recommended folder template. His standardized structure promotes firm-wide consistency, increasing productivity and helping his firm save \$150,000 annually in billable time while delivering better client experiences.

## IRS Collection

- 📁 Client's Name
  - 📁 Alimony, Child Support, and Court Ordered Pmts
  - 📁 Automobile Expenses
  - 📁 Engagement Letter
  - 📁 Estimated Tax Payments
  - 📁 Foreign Assets
  - 📁 Health Care Expenses
  - 📁 Investment Account Statements
  - 📁 IRS and State Tax Correspondence
  - 📁 Life and Disability Insurance Statements
  - 📁 Power of Attorney
  - 📁 Proof of Income
  - 📁 Real Estate Documents
  - 📁 Retirement Account Statements
  - 📁 Tax Returns
  - 📁 Utility Bills
  - 📁 Virtual Currency values (Crypto)



“

Given that I help taxpayers handle IRS issues for a living, **SmartVault is a must have** for all my clients to keep documents secure and available so we can access them whenever and wherever necessary.”

Eric Green ESQ

⬇️ There's more! The IRS Audits (Examination) structure is on the next page.

## IRS Audits (Examination)

### Client's Name

#### Personal Deductions / Credits

- ▶ Casualty and Theft Loss documentation from a federally declared disaster
- ▶ Charitable Donation documentation
- ▶ Medical and Dental Expenses
- ▶ Mortgage Interest paid
- ▶ Other itemized deduction documentation
- ▶ Personal Property Taxes paid
- ▶ Real Estate Taxes paid
- ▶ State & Local Income Taxes paid

#### Business Income and Expense


- ▶ Advertising
- ▶ Bank Statements
- ▶ Business property expenses
- ▶ Car and truck expenses
- ▶ Commissions and fees
- ▶ Contract labor
- ▶ Copies of Tax Returns
- ▶ Depletion / Depreciation / Section 179
- ▶ Employee Wages
- ▶ Employee Benefits
- ▶ Engagement Letter
- ▶ Financial Statements: Balance Sheet, Profit and Loss, Statement of Cash Flows
- ▶ Insurance (other than health)
- ▶ Interest Expense
- ▶ IRS Correspondence
- ▶ Investment Statements
- ▶ Legal and professional services
- ▶ Mileage Support for Automobile Deduction
- ▶ Office expense
- ▶ Other Expense Documentation
- ▶ Pension and profit-sharing plans
- ▶ Power of Attorney (Form 2848)
- ▶ Rent or lease
- ▶ Repairs and maintenance
- ▶ Retirement Accounts
- ▶ Supplies
- ▶ Taxes and licenses
- ▶ Travel and Travel Meals
- ▶ Utilities
- ▶ Vehicles, machinery, and equipment

## How SmartVault Saves My Firm \$150,000 a Year

In Eric's whitepaper, he takes you behind the scenes of how he discovered SmartVault when a client's physical records were completely destroyed. But as you'll learn, implementing SmartVault ended up delivering an unexpected bonus: **a staggering \$150,000 per year in productivity savings for his firm.**

See exactly how he does it.

[Read the whitepaper ▶](#)

 There's more on the next page!

# Sample Letters, Waivers, and Checklists



Want to use the exact templates Eric Green uses at his firm? He shared his documents, including client letters, checklists, waivers, and more, to help you provide clear information and direction to your clients. **You'll receive these templates when you purchase SmartVault.**

## Template Packet

1. Audit Recon Letter
2. DATL Letter
3. Innocent Spouse Letter
4. Non-Filer Letter
5. Resolving a Back Tax Debt Letter
6. Analysis Letter
7. Disengagement Letter
8. Release of Levy Letter
9. Offer Letter
10. Company & Partner Conflict Waiver
11. Spouse Conflict Waiver
12. IRS Collection Checklist
13. Penalty Abatement Checklist
14. Lien Document Checklist
15. Innocent Spouse Checklist

## Sample: Letter to Release of Levy

We submitted the 433-A you requested along with all of the taxpayer's supporting documentation. As we discussed, you agree with our conclusion that the Taxpayer has no ability to pay and should have their account placed in "Uncollectible" status. Despite this, however, you indicated that you had no intention of releasing the levy on the taxpayer's wages because of the taxpayer's missing 2019 return. I wanted to point out that you are legally obligated to release the levy regardless of the taxpayer's compliance.

Pursuant to IRC § 6343 a levy must be released if it is causing economic hardship, which is defined as someone who is "Uncollectible." The United States Tax Court has reiterated this in its decision in Kathleen A. Vinatieri v. Commissioner, Docket No. 15895-08L (2009). In its decision, the United States Court stated:

Under regulations prescribed by the Secretary, the Secretary must release a levy upon all, or part of, a taxpayer's property or rights to property if, inter alia, the Secretary has determined that the levy is creating an economic hardship due to the financial condition of the taxpayer. Sec. 6343(a)(1)(D), I.R.C. The regulations provide that a levy is creating an economic hardship due to the financial condition of an individual taxpayer and must be released "if satisfaction of the levy in whole or in part will cause an individual taxpayer to be unable to pay his or her reasonable basic living expenses." Sec. 301.6343-1(b)(4), *Proced. & Admin. Regs.*

***Sec. 6343(a)(1)(D), I.R.C., and sec. 301.6343-1(b)(4), *Proced. & Admin. Regs.*, require release of a levy that creates an economic hardship regardless of the taxpayer's noncompliance with filing required returns.***

If you disagree, please respond in writing explaining your authority. Otherwise please release the levy and ...



# Power Efficiency, Scale Your Firm, and Simplify Compliance

SmartVault: For modern accounting firms seeking more than document management.

Streamline your entire document workflow with one powerful solution - secure document storage, branded client portals, eSignatures, form fills, engagement letters, quoting, and more.

## Elevate Client & Staff Experience

Branded portals enable secure file sharing, eSignatures, and real-time collaboration - redefining efficient, high-quality client engagement.

## Access Anytime, Anywhere

Never miss a beat with 24/7 self-serve access to your files from any device, enabling your team and clients to keep projects moving forward.

## Simplify Security and Compliance

Bank-grade encryption, two-factor authentication, and detailed audit trails eliminate security and compliance concerns, safeguarding client data.

**“SmartVault has improved our processes so much that I can confidently say it’s increased our efficiency by 75%.”**

Benjamin Copeland, Copeland Financial Services

## Built for You

Tailored to your unique workflows, demands, and pain points to help you maximize productivity and growth.



**15+**  
years



**3M+**  
users



**500M+**  
docs stored



## Scale Effortlessly

Whether you're a solo practitioner or leading a large firm, SmartVault grows as you do with unlimited storage and guest users.

## Integrate for Seamless Productivity

Boost productivity by connecting SmartVault with your existing accounting software for error-free, streamlined document management workflows.

## Get Up & Running Fast

Comprehensive U.S.-based onboarding, training, and support ensures you, your staff, and your clients have the knowledge and confidence to use the platform to its fullest potential.

**"I implemented SmartVault to ensure our documents are securely backed up and accessible from anywhere. But the real surprise has been the substantial productivity gains. I can quantify the impact: SmartVault has saved our firm \$150,000 per year."**

Eric L. Green, Esq.  
Tax Rep Network, Green & Sklarz LLC

## Proof in the Numbers: The 2024 Tax Season

**100%**

uptime

**68M+**

document  
downloads

**38M+**

document  
uploads

**50K+**

new vaults  
created

**217K+**

documents sent  
for eSignature

**Schedule a Demo:**  
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**eric-green**