



TaxAdvisor 360: Your AI Partner for Tax Controversy Excellence

Transform How You Handle IRS Examinations, Appeals, and Collection Defense

What Tax Professionals Really Need

You face a constant challenge: delivering expert-level tax controversy representation while managing crushing time pressures, ever-changing IRS procedures, and clients who need answers now.

Traditional approach: Spend hours digging through the Internal Revenue Manual, researching case law, piecing together procedures from multiple sources, and hoping you haven't missed something critical.

TaxAdvisor 360 approach: Get guided, expert-level assistance that walks you through the exact steps you need for your specific situation - in minutes instead of hours.

This isn't another generic AI that dumps information and leaves you to figure out what applies. TaxAdvisor 360 works like having a senior tax controversy specialist sitting beside you, asking the right questions and guiding you to the best solution for each unique case.

How TaxAdvisor 360 Actually Works

The Socratic Method: Learning While You Work

Remember how the best mentors taught you? They didn't lecture - they asked strategic questions that led you to the right answers while building your understanding.

TaxAdvisor 360 uses this proven Socratic method for every case. Instead of overwhelming you with everything about CDP procedures, it asks: "What type of notice did your client receive and when?" Based on your answer, you get exactly the guidance you need, then the next most relevant question.



Why this matters:

- No more information overload from irrelevant details
- Build genuine expertise with every case you handle
- Get customized guidance that fits your exact situation
- Learn the "why" behind procedures, not just the "what"

Confidence Scoring: Know When to Trust the Guidance

Here's what makes TaxAdvisor 360 different from every other AI tool: it tells you exactly how confident it is in its recommendations before giving them.

High Confidence (90%+): "This guidance is rock solid. You can rely on it for your case strategy."

Moderate Confidence (70-89%): "Good authority supports this, but verify key points for your specific situation."

Low Confidence (Below 70%): "This is our best analysis, but there's substantial uncertainty. Consider consulting a specialist."

This transparency means you never mistake uncertain guidance for authoritative direction. You always know when to trust and proceed versus when to dig deeper or get additional consultation.

What TaxAdvisor 360 Covers

IRS Examination Defense

From the moment a client receives an audit notice through final resolution, you get systematic guidance:

Notice Classification: Instantly identify whether it's a CP2000, correspondence audit, office audit, field audit, or statutory notice - each requiring different response strategies.

Deadline Management: Automatic calculation of exact deadlines accounting for weekends, holidays, and special rules like 60-day extensions for international taxpayers.

Strategic Response Planning: Issue-specific guidance on documentation requirements, interview strategies, Information Document Request handling, and scope protection to prevent examination expansion.



Example Scenario: *Your client receives Letter 525 proposing \$45,000 in adjustments. You input the notice details. Within minutes, you know you have 30 days to respond, whether a formal written protest is required, what documentation will strengthen your position, and how to structure arguments for Appeals consideration. What would have taken 3-4 hours of research happens in 15 minutes.*

Appeals Process Navigation

Master every aspect of getting your clients through Appeals successfully:

Protest Letter Preparation: Structured guidance ensuring you address all required elements per Revenue Procedure 2012-18 while positioning cases strategically for Appeals Officers.

Conference Strategy: Format-specific preparation for telephone, virtual, or in-person conferences with document organization frameworks and settlement positioning tactics.

Hazards of Litigation Analysis: Understanding how Appeals Officers evaluate case strength to develop settlement strategies that maximize favorable outcomes.

Example Scenario: *Business client facing \$125,000 in proposed adjustments across three tax years. The system helps you prioritize the strongest arguments, structure your protest efficiently, identify relevant case law, and develop hazards of litigation positioning. Protest preparation drops from 12 hours to 3 hours - and the result is more comprehensive than what you'd produce manually.*

Collection Due Process & Alternatives

Handle time-critical collection defense with confidence:

CDP Eligibility Determination: Immediate analysis of whether your client qualifies for full CDP hearing (with Tax Court review rights) or Equivalent Hearing based on notice type and timing.

Form 12153 Preparation: Step-by-step guidance ensuring you preserve all collection defense rights while positioning for favorable Settlement Officer consideration.

Collection Alternative Analysis: Systematic evaluation of Offers in Compromise, installment agreements, Currently Not Collectible status, and other options based on client financial circumstances.

Example Scenario: *Client calls Friday afternoon about a levy notice received 25 days ago. You determine they have exactly 5 days left to file Form 12153. The system provides immediate guidance on completing the form, what collection alternatives to propose, required financial documentation, and certified mail filing instructions. Crisis handled in 30 minutes instead of panicked hours of research.*



Penalty Abatement Strategies

Systematically evaluate all penalty relief options:

First-Time Abatement: Quick eligibility checking against three-year compliance requirements, identifying which penalties qualify, generating appropriate request language.

Reasonable Cause Analysis: Evaluation of circumstances demonstrating ordinary business care despite events beyond client control - illness, disaster, reliance on professional advice.

Strategic Positioning: Guidance on whether to pursue administrative relief, Appeals consideration, or litigation based on fact patterns and authority strength.

Example Scenario: *Client owes \$8,000 in penalties for late filing due to serious illness. System evaluates First-Time Abatement eligibility (client qualifies - clean three-year history), provides template request language citing IRM authority, and ensures you preserve reasonable cause arguments as backup. Administrative request granted within 30 days.*

Legal Research & Authority Evaluation

Find the right authority to support your positions:

Hierarchical Source Guidance: Systematic evaluation from primary sources (IRC, Treasury Regulations) through secondary sources (Revenue Rulings, case law), explaining which authority provides strongest support.

Substantial Authority Analysis: Determining whether your position meets standards for penalty protection under accuracy-related penalty provisions.

Citation Quality Assessment: Understanding which authorities IRS and courts find most persuasive for different types of arguments.

Example Scenario: *Researching whether client qualifies for innocent spouse relief. System guides you through IRC §6015 provisions, identifies relevant factors from Revenue Procedure 2013-34, locates applicable Tax Court cases from your circuit, and helps you evaluate which relief provision best fits client circumstances. Research that would take hours happens in 20 minutes.*

Quality Control & Return Review

Catch errors before they become problems:

Pre-Filing Review Protocols: Systematic checklists by return type ensuring mathematical accuracy, substantive compliance, and entity-specific requirements are met.



Circular 230 Compliance: Integration of professional standards throughout all guidance, ensuring your work meets regulatory requirements.

Risk Assessment: Evaluation of positions against known IRS examination triggers, helping clients make informed decisions about aggressive positions.

Example Scenario: *Reviewing complex partnership return before filing. System's checklist catches K-1 basis calculation error, identifies passive activity loss grouping issue, and flags related-party transaction requiring additional documentation. Potential examination issues resolved before filing.*

Client Service & Communication

Explain complex procedures in plain English:

Technical Translation: Sophisticated tax concepts explained using business analogies clients understand without sacrificing accuracy.

Strategic Counseling Frameworks: Guidance on presenting options, costs, timeframes, and probability-weighted outcomes so clients can make informed decisions.

Expectation Management: Realistic timeline and outcome explanations preventing client disappointment and supporting stronger practitioner-client relationships.

Real-World Impact: What Users Report

Time Savings That Matter

Audit Response Preparation: 12-15 hours → 3-5 hours (60-75% reduction) *"I can now handle three times as many examination cases without working longer hours. The systematic approach actually produces better quality than my old manual research methods."* - CPA, Solo Practice

Written Protest Drafting: 10-12 hours → 3-4 hours (70% reduction) *"The structured templates ensure I don't miss any procedural requirements while the authority suggestions identify case law I would have overlooked. My protests are more comprehensive and take a fraction of the time."* - EA, Mid-Sized Firm

Collection Alternative Analysis: 3-4 hours → 45 minutes (75% reduction) *"When clients call about levy notices, I used to panic about the research time. Now I provide expert guidance in the same call. Clients are amazed at how quickly I can assess their options."* - Tax Attorney, Small Practice



Quality Improvements

Comprehensive Coverage: The systematic approach ensures no procedural steps or strategic opportunities are overlooked, even on complex multi-year cases.

Consistent Excellence: Junior practitioners produce work quality approaching senior practitioners through guided analysis, while senior practitioners benefit from systematic double-checking.

Strategic Positioning: Better understanding of how Appeals Officers and Settlement Officers evaluate cases leads to more favorable settlements and collection alternative approvals.

Professional Development

Accelerated Learning: Junior practitioners report developing expertise in 18-24 months that traditionally took 4-5 years through trial and error.

Confidence Building: The Socratic method and confidence scoring help practitioners understand when they can proceed independently versus when specialist consultation adds value.

Knowledge Retention: Learning while working through real cases produces deeper understanding than passive reading of procedures and guidance.

How It Integrates Into Your Practice

Getting Started

Access TaxAdvisor 360 through CalStudio.com - no software installation, no complex setup. Simply log in and start with your next examination, Appeals, or collection case.

Best Practices for Maximum Value

Use for Initial Case Assessment: Begin every controversy matter with systematic evaluation using the guided decision process. This ensures you identify all relevant issues and strategic options from the start.

Leverage for Document Drafting: Start protests, CDP requests, penalty abatement letters, and Tax Court petitions with system-generated templates. Customize for specific client facts while maintaining comprehensive coverage.



Apply for Client Education: Use the plain-English explanations as models for your own client communications. The business analogies and systematic approach work as well for clients as they do for you.

Implement Quality Checks: Review all guidance with your professional judgment while using the systematic checklists to ensure nothing important is missed.

Training Your Team

The Socratic approach means your team learns while working:

Junior Practitioners: Develop expertise naturally through guided questioning that explains the "why" behind procedures. Each case becomes a professional development opportunity.

Senior Practitioners: Benefit from systematic approaches to complex procedures while having their expertise validated. The system becomes a sophisticated double-check ensuring nothing is overlooked.

Administrative Staff: Can handle routine deadline tracking and document organization using system guidance, freeing practitioners for higher-value work.

Why TaxAdvisor 360 Beats Alternatives

Unlike Generic AI Tools

Generic AI (ChatGPT, Claude, etc.):

- Dumps comprehensive information requiring you to sort what's relevant
- Provides one-size-fits-all responses regardless of your specific situation
- Gives no indication of reliability or confidence levels
- Cannot cite tax-specific authorities with verification

TaxAdvisor 360:

- Asks strategic questions leading you to exactly what you need
- Customizes guidance based on your specific case facts through adaptive questioning
- Explicitly states confidence levels so you know when to trust versus verify
- Provides hierarchical authority citations with quality assessment



Unlike Other Tax AI Products

Blue J: Excellent for predicting litigation outcomes through case law analysis, but doesn't provide the procedural guidance, deadline management, or document generation capabilities you need for day-to-day controversy practice.

TaxGPT: Provides broad tax question answering but lacks the structured decision frameworks, confidence transparency, and educational Socratic approach that build your expertise.

Thomson Reuters Checkpoint AI: Outstanding research database with AI enhancement, but focuses on traditional research rather than reimagining the practitioner workflow with guided procedures and strategic frameworks.

TaxAdvisor 360's Advantage: Combines the procedural expertise you need for controversy practice with the educational approach that builds your skills and the confidence transparency that manages professional risk.

Professional Security You Can Trust (Including HIPAA Compliance)

TaxAdvisor 360 operates on CalStudio.com using enterprise-grade Amazon S3 and Amazon Bedrock infrastructure. This isn't consumer AI technology adapted for professional use - it's purpose-built professional infrastructure from the ground up, meeting the same rigorous security standards as healthcare and financial services technology.

Industry-Leading Security Compliance

SOC 2 Type II Certification: Strict controls over data security, availability, processing integrity, confidentiality, and privacy through Amazon's infrastructure. The Type II designation means controls have been tested over time, not just designed on paper.

ISO 27001 Compliance: Comprehensive information security management including systematic risk assessment, layered security controls, and continuous monitoring verified by independent auditors.

GLBA Compliance with Written Information Security Program: Meets Gramm-Leach-Bliley Act requirements through comprehensive safeguards addressing administrative, technical, and physical security for financial information - because tax professionals are covered entities under GLBA.



HIPAA Compliance - Healthcare-Grade Protection: CalStudio goes beyond standard tax technology by offering voluntary HIPAA compliance for practices serving healthcare clients or handling Protected Health Information (PHI). The platform maintains Business Associate Agreements with Google Cloud Platform and Amazon Web Services, ensuring HIPAA-compliant AI models (Claude via AWS Bedrock, OpenAI via Microsoft Azure, Gemini via Google Cloud Platform) are used when handling sensitive information. All data transmissions use end-to-end encryption, complete customer data isolation prevents cross-contamination, and you maintain full control over data retention with opt-out options for ephemeral usage. For enterprise clients, custom BAAs are available to meet specific compliance requirements.

Regular Security Assessment: The platform undergoes continuous vulnerability scanning and annual penetration testing by independent security firms to ensure protection remains effective against evolving threats.

Advanced Protection Features

Sophisticated PII Detection: The system immediately identifies and protects any personally identifiable information. When PII is detected, all conversation context is cleared and processing starts fresh - ensuring complete protection of sensitive client data.

Professional Standards Integration: All guidance incorporates Circular 230 requirements with proper authority citations and disclaimers. The system helps you maintain professional standards while working efficiently.

Client Confidentiality: Unlike consumer AI that may use your inputs for training, TaxAdvisor 360 on Amazon Bedrock ensures your client information is never used to train models or influence other users' responses. Complete isolation between users protects client confidentiality.

Why This Security Level Matters

When sophisticated clients ask about your technology security, you can confidently cite SOC 2 Type II certification, ISO 27001 compliance, and HIPAA-grade protection. When procurement departments evaluate vendors, you meet the same security standards as enterprise software. When you're concerned about professional liability, the sophisticated PII protection and professional standards integration reduce risks rather than creating new ones.

Healthcare Practices Benefit Especially: If your practice serves medical professionals, healthcare organizations, or handles any Protected Health Information, the HIPAA compliance means you can use TaxAdvisor 360 without creating compliance gaps. The platform's Business Associate Agreements with major cloud providers and complete data isolation ensure PHI remains protected to the same standard as your practice management systems.



Pricing That Makes Sense

Individual Practitioner: Starting at \$150/month for solo practitioners and small practices. Full system access, quarterly knowledge base updates, email support.

Firm Licensing: Volume discounts starting at \$125/month per practitioner for firms with 5+ practitioners. Monthly knowledge base updates, priority support, training resources included.

Enterprise/Network: Custom pricing for large firms and professional service networks with 50+ practitioners. Dedicated account management, custom training programs, integration support.

Risk-Free Trial: 30-day full-access trial with no credit card required. Evaluate the system with your real cases and measure the actual time savings before committing.

Getting Started

Immediate Next Steps

- 1. Request Demo Access:** See TaxAdvisor 360 in action with guided walkthrough of key capabilities for examination defense, Appeals preparation, and collection alternatives.
- 2. Start Free Trial:** Get full system access for 30 days. Use it with your actual pending cases and measure the real impact on your practice.
- 3. Evaluate Results:** Compare your time investment and outcome quality using TaxAdvisor 360 versus your traditional methods. The efficiency gains and quality improvements become obvious quickly.
- 4. Implement Practice-Wide:** Once you've verified the value, roll out to your entire team with training and implementation support included.

Support Resources

Comprehensive Training: Video tutorials, written guides, and live webinars help you and your team get up to speed quickly.

Ongoing Support: Email and chat support ensure you get help when you need it. Priority support for firm and enterprise licenses.

Knowledge Base Updates: Regular updates ensure guidance remains current with IRS procedure changes, new case law, and regulatory developments.



Community Access: Connect with other practitioners using TaxAdvisor 360 to share best practices and learn from each other's experiences.

What Makes TaxAdvisor 360 Essential

This isn't about replacing your professional judgment - it's about augmenting your expertise with systematic guidance that ensures you never miss important procedures or strategic opportunities.

For Solo Practitioners: Handle complex controversy cases you might otherwise refer out, expanding your service offerings and practice revenue.

For Mid-Sized Firms: Ensure consistent quality across all practitioners while accelerating junior practitioner development and improving overall practice efficiency.

For Large Firms and Networks: Scale controversy expertise across multiple offices and practitioners, creating standardized excellence while maintaining the flexibility for professional judgment in unique situations.

For Every Tax Professional: Reduce the stress of time-critical controversy deadlines, improve the quality of your work product, build genuine expertise while handling day-to-day cases, and sleep better knowing you haven't overlooked critical procedures or opportunities.

The Bottom Line

Tax controversy practice is increasingly complex, with tightening IRS procedures, evolving case law, and clients expecting rapid expert guidance. You can't afford to spend hours researching every procedural nuance, yet you can't afford to miss critical deadlines or strategic opportunities.

TaxAdvisor 360 gives you expert-level guidance exactly when you need it, builds your expertise with every case, and provides the confidence transparency you need to make informed professional judgments. The time savings alone justify the investment, but the quality improvements and professional development benefits create value that compounds over time.

This is what the future of professional tax practice looks like - sophisticated AI that augments rather than replaces professional judgment, educates rather than just answers, and provides transparency rather than black-box recommendations.



STERLING TAX IQ

BEYOND EXPERTISE

Ready to transform how you handle tax controversy? Start your free 30-day trial today.

Contact Sterling Tax IQ:

Phone: (601) 207-0355

Email: support@sterlingtaxiq.com

Web: sterlingtaxiq.com

Our team is ready to answer your questions, schedule a demo, or help you get started with your free trial. We understand you're busy, so we make the process simple - one call or email gets you everything you need to evaluate TaxAdvisor 360 with your real cases.

TaxAdvisor 360 operates on CalStudio.com using Amazon S3 and Amazon Bedrock infrastructure, providing enterprise-grade security with SOC 2 Type II certification, ISO 27001 compliance, GLBA compliance with Written Information Security Program, HIPAA compliance with Business Associate Agreements, and regular vulnerability scanning and penetration testing.



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