A tax problem shouldn't hold your client's plan hostage.

You don't have to out-argue the IRS. **You have to know its record better than it does.**

TWO MOMENTS EVERY WEALTH ADVISOR KNOWS

The deal a tax problem is holding up.

A business sale, refinance or home purchase stalls on a federal tax lien, an unresolved balance, or due diligence that turns up an IRS dispute. Closing dates don't wait for the IRS.

The plan you can't carry out.

A levy freezes an account, a lien clouds a transfer, a passport gets flagged, or the client is too consumed by the IRS to make decisions. Your recommendations sit on hold until the tax problem is solved.

WHAT CASE COMMAND DELIVERS

We take the client's whole IRS file and return **one audited chronology**: what the IRS did, when, and where it went wrong. **Every entry cites its source page**, so the client's attorney and CPA work from the same record and the path to resolution is clear.

DATE	ENTRY	LOGGED AS	SOURCE
Jan 15, 2025	Notice of Federal Tax Lien filed; lender pauses refinance closing.	What happened	IRS Form 668(Y), p. 1
Feb 3, 2025	Lien balance includes a 2021 payment the client's bank records show was made.	Open question	Bank statement, p. 4
Feb 20, 2025	Apply for a certificate of discharge so the closing can proceed.	Needs to happen	Lender closing schedule, p. 2

Illustrative example only; not drawn from a client matter.

TRACK RECORD

- **Grendahl & Johnson v. Commissioner, U.S. Tax Court Docket No. 10721-24.** Summary judgment eliminated the 2021 deficiency and all penalties; the IRS then conceded every remaining claim three days before trial. Zero deficiency, zero penalties.
- **Schedule C exam, now in Tax Court.** The IRS issued its deficiency notice without reviewing the audit response. Case Command substantiated every expense and caught the one missing bank statement in the client's own package.
- **Appeal on a record no one built.** Working inside a limited trial record, Case Command traced the IRS error to a specific transaction code and the information-sharing failure behind it.

WHERE IT FITS

Built for the IRS problems that stop plans

Liens and levies, unresolved balances, exams, penalties, passport certifications, and refund disallowances such as ERC.

Everyone stays in their lane

Delivered through Parent & Parent LLP as legal counsel; the case work is privileged. With your client's permission, we keep you posted on status and timing so the plan can move.

Bring us the deal a tax problem is holding up, or the plan you can't move forward.

Start with one introduction. We review the IRS record, tell your client where they stand, and, with their permission, keep you posted on timing.

Anthony Parent, Esq.
Parent & Parent LLP · IRSMedic
aparent@irsmedic.com · (203) 541-5508

Brett Grendahl
Founder & CEO, Built Data · Patent Inventor
brett@builtdata.io · (650) 793-2361

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