THE OFFER

An IRS notice has a date on it. *So does your callback.*

Tax clients usually call holding a letter: an audit notice, a balance due, a levy warning. The date on that letter often decides what options remain.

The agent answers in English and Spanish, records the type and date of the IRS or Florida Department of Revenue notice, marks urgent notices for attorney review, and books the consultation. It never advises a caller on what to tell the IRS.

ANSWER

A bilingual front door, 24/7

Voice, text, and web chat, answered in English and Spanish with a target of under a minute. Callers in other languages go to a person or a scheduled callback.

SORT

Every inquiry by matter type and urgency

IRS audits, notices of deficiency, back taxes and payment plans, levies, liens, and garnishments, and Florida sales and business taxes. Urgent calls transfer live to the attorney on call, with a text alert if nobody picks up.

BOOK

Consults booked, conflicts checked

Collects every party name for your conflict check before any details, books the consultation, and runs reminders and reschedules.

BE FOUND

Named when clients ask AI

English and Spanish tax law pages that answer real questions, plus LegalService and Person schema for each attorney, so ChatGPT and Google can find and cite your firm by name.

The guardrails

- **No tax advice.** The agent never tells a caller what to say to the IRS, which program they qualify for, or what they will owe.
- **Notice deadlines flagged.** Tax deadlines run from the date on the notice, such as 90 days to petition the Tax Court after a notice of deficiency (26 U.S.C. § 6213).
- **Criminal exposure goes to a person.** If a caller mentions special agents, a criminal investigation, or unfiled years with large amounts, the agent stops collecting details and transfers the call to an attorney if one is available, or texts the on-call attorney an alert, so nothing sensitive sits in a chat log.
- **No numbers that do not belong.** Intake never asks for Social Security numbers, account numbers, or full returns.
- **Clearly a law firm.** The agent says it is an assistant, never an attorney.

How it works

1 FREE
Bar Compliance and AEO Audit. Rule-labeled gaps on your current site.

2 $1,997 · TWO DAYS PLUS ONLINE
Growth Systems Intensive. Booking, missed-call text-back, 7-day bilingual follow-up, FAQ chat. Credits in full toward Implementation within 60 days.

3 FROM $4,997 · 90 DAYS
Implementation. The bilingual voice and messaging agent, intake by notice type, notice-date capture for attorney review, criminal-exposure alerts, texted checklists with secure upload links, and Spanish practice-area pages built for AI search.

4 FROM $649 / MONTH
Care. The Practice seat, with 5,000 texts and 150 voice minutes a month. Optional hours cover call review.

NEXT STEP

A 30-minute intake review

We walk through how inquiries reach your firm today, where they leak, and what the agent would handle. Founder-led by **Brandon Aday**.

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Se habla español
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