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IRS Scams: How to Spot and Avoid Them

Scammers posing as the IRS have stolen billions of dollars from thousands of victims, often using fear and intimidation to get their way. Knowing their tricks is the first step to protecting yourself — and helping elderly loved ones stay safe, too.

Here's what to watch for and how to stay one step ahead.

3 Common Tax Schemes You May Encounter

Unclaimed Tax Refunds: In this scheme, scammers will send letters telling victims they have unclaimed refunds. These letters ask for personal information that can be leveraged for identity theft.

Unpaid Taxes: Scammers will pose as IRS agents and accuse victims of owing back taxes. These schemes can make use of threats of arrest, legal action and deportation to scare victims into paying.

Tax Credit and Refund Misinformation: Scammers may leverage social media and other advertising outlets to lure people into filing claims for tax credits they aren't eligible for,

such as the fuel tax credit or family leave credit, in an attempt to obtain personal or financial information.

Is it really the IRS? Here's how to tell.

Don't panic. Take a moment to assess the situation: The IRS won't ask for immediate payment or personal details over the phone, text or email, especially without prior written notice.

Look for red flags. Threats, pressure and demands for personal information are common warning signs that you are dealing with a scammer. Be on the lookout for misspellings or suspicious website links.

Verify any correspondence you get from the IRS. You can go to the IRS website to verify a letter or notice. You can also ask a qualified tax professional for help when you hear from the IRS (or a potential scammer).

Are you ready for the tax season this year? Reach out if you have any questions.

Helping clients get back to the basics of building and maintaining wealth in a tax efficient way.



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