

Adrianna Casalnuovo <adriannac816@comcast.net>

5/15/2025 8:32 AM

## Urgent: Request for Refund and Termination of Services Due to Poor Customer Service

To Support Team <support@incitetax.com> Copy Briana Scott <briana.s@incitetax.com> • justin.f@incitetax.com <justin.f@incitetax.com> • raben7@gmail.com <raben7@gmail.com>

Dear Incite Tax Team,

I'm writing to formally express my deep dissatisfaction with the level of service I have received over the past two tax years. Last year, I had to be reassigned to a different tax preparer because my repeated attempts to get in touch went unanswered. The situation was so poor that I was offered a \$150 credit to stay on this year with a new representative.

Unfortunately, the service this year has been equally unacceptable. I contacted my new preparer multiple times via email, and it took over a month to receive any response. I paid \$500 for services that were not delivered with the professionalism, timeliness, or reliability expected, especially from a firm handling sensitive financial matters.

After requesting a refund and stating that I had lost all confidence in your services, Briana informed me that she would forward my concerns to your support team. That was over a week ago, and I have still not received any follow-up. This continued lack of communication is not only frustrating but entirely unacceptable given the stakes involved—I currently owe over \$60,000 to the IRS, and Incite Tax has provided no meaningful assistance or support.

At this point, I am no longer willing to chase down responses or wait for basic customer service. I have already filed a dispute with my credit card company regarding the \$500 charge, and unless I hear back from you promptly with confirmation of a refund, I will escalate the matter through all available legal and financial channels.

I am willing to forgo the \$150 credit if you process a full refund of the \$500 immediately. Otherwise, I will proceed with the dispute and take further action as necessary.

Please confirm receipt of this message and provide an update within 48 hours.

Sincerely,  
Adrianna

On 05/12/2025 5:08 PM EDT Briana Scott <briana.s@incitetax.com> wrote:

Hi Adrianna,

I CC'ed them in the previous email, however their email is [support@incitetax.com](mailto:support@incitetax.com). You could also call into our main line and ask for client relations 801-999-8295

Thanks,

**#IRSSucks**

Briana L Scott, MBA

385-274-6155 / [briana.s@incitetax.com](mailto:briana.s@incitetax.com) / [www.incitetax.com](http://www.incitetax.com)

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On Mon, May 12, 2025 at 2:48 PM Adrianna Casalinuovo <[adriannac816@comcast.net](mailto:adriannac816@comcast.net)> wrote:

Will you please forward me the contact information for your client relations department.

On 05/12/2025 4:50 PM EDT Briana Scott <[briana.s@incitetax.com](mailto:briana.s@incitetax.com)> wrote:

Hi Adrianna,

I completely understand your frustration and sincerely apologize for that.

I'm going to move your concerns onto our client relations team to discuss everything, including how to move forward in the process. I wish I could assist you further, but I can't personally process refunds.

If you have any additional questions for me, please let me know.

Thanks,

**#IRSSucks**

Briana L Scott, MBA

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On Fri, May 9, 2025 at 5:26 PM Adrianna Casalinuovo <[adriannac816@comcast.net](mailto:adriannac816@comcast.net)> wrote:

Hi Briana,

I've experienced ongoing communication issues first with Ashby and now again with you. While I understand that things come up, a brief acknowledgment of my emails would have made a significant difference. It only takes a moment to respond and helps maintain trust, especially in situations involving sensitive financial matters.

I was transferred to you because of prior communication breakdowns, so continuing to experience delays has been incredibly frustrating. After waiting

over a month and sending multiple follow-ups with no response, I've completely lost confidence in Incite.

At this point, I no longer wish to proceed and am requesting a full refund of \$500 to my credit card. As I mentioned previously, I believe the \$150 credit I received should more than cover the filing of the extension. Please confirm that the refund will be processed and, at the very least, that the IRS extension was indeed filed.

My sister, who works with Mandy, referred me to Incite, and while her experience has been positive, mine has not. She has recommended Incite to several friends and neighbors, many of whom have also reported issues. Based on my experience, I do not believe she will continue referring others, and I can say with certainty that I definitely will not.

We are talking about a serious matter. Owing another \$30,000 to the IRS is stressful enough on its own. Navigating this while undergoing breast cancer treatment and being met with silence from the person handling my case has been unacceptable and incredibly disheartening.

Please advise when the refund will be processed, and could you also send confirmation that the extension was filed?

Thank you

On 05/09/2025 10:51 AM EDT Briana Scott <[briana.s@incitetax.com](mailto:briana.s@incitetax.com)> wrote:

Hi Adrianna,

I apologize and understand your frustration. I can assure you this isn't representative of the ongoing customer service you'd be receiving. I can understand you losing confidence. Again I want to apologize, there were several bottlenecks I've experienced throughout the busy season that I've been working on getting corrected and have full intentions and confidence that this wouldn't happen again. I'd be happy to over communicate along every step of the way with you.

I know you mentioned in your previous email that you sent docs directly to Ashby? I've reached out to him in order to check in on this as there are documents I don't have access to in order to complete prep work or even give a good estimate on your tax liability. In the meantime while I wait for his reply the below are the documents I would need:

- K-1: CM Venture 2022 LLC
- K-1: UPE
- Any additional information or income that was new in 2024 that I should be aware of

Again, if you're willing I'd love the opportunity to prove to you that this wasn't an accurate representation of the customer service you'd be receiving from me as your tax pro.

Please let me know your thoughts.

Thanks,

**#IRSSucks**

Briana L Scott, MBA

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On Thu, May 8, 2025 at 9:49 AM Adrianna Casalnuovo <[adriannac816@comcast.net](mailto:adriannac816@comcast.net)> wrote:

Hi Briana,

I'm following up **again** as I haven't received a response to my **TWO** previous emails. Unfortunately, I'm beginning to feel like I'm experiencing the same issues I had with Ashby. If this is representative of the ongoing level of customer service, I would prefer to apply the credit I received for submitting my extension and request a refund for the remaining balance paid of \$500.

I no longer want to be in a position where I have to repeatedly ask for assistance. Please process a refund of the \$500 I paid. I genuinely hoped this experience would be different, but at this point, I've lost confidence. Please respond to this email ASAP, letting me know when the credit will be processed.

On 05/04/2025 1:47 PM EDT Adrianna Casalnuovo <[adriannac816@comcast.net](mailto:adriannac816@comcast.net)> wrote:

Briana,

I never received a response to my email below from 4/14. I would like to pay 2024 in full, or at least the estimated amount. Could you please advise. Also, the portal is requesting documents that have already been submitted on the portal and sent to Ashby. Can we please jump on a call to discuss what is still needed.

----- Original Message -----

From: Adrianna <[adriannac816@comcast.net](mailto:adriannac816@comcast.net)>

To: Briana Scott <[briana.s@incitetax.com](mailto:briana.s@incitetax.com)>

Date: 04/14/2025 8:56 PM EDT

Subject: Re: Check your IRIS Client Portal for Tax Documents Needed

What is the estimated tax payment?

Sent from my iPhone

On Apr 14, 2025, at 3:46 PM, Briana Scott <[briana.s@incitetax.com](mailto:briana.s@incitetax.com)> wrote:

Hi Adrianna,

I'd like to assure you that we filed an extension on your behalf to ensure you're safe guarded from any late filing penalties.

Thank you,

**#IRSSucks**

Briana L Scott, MBA

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On Mon, Apr 7, 2025 at 5:01 PM Adrianna Casalnuovo <[adriannac816@comcast.net](mailto:adriannac816@comcast.net)> wrote:

The portal is requiring documents that I don't have yet. I also don't see anything to file an extension!

----- Original Message -----

From: Adrianna Casalnuovo <[adriannac816@comcast.net](mailto:adriannac816@comcast.net)>

To: Admin Team <[adminteam@incitetax.com](mailto:adminteam@incitetax.com)>

Date: 04/07/2025 7:01 PM EDT

Subject: Re: Check your IRIS Client Portal for Tax Documents Needed

I don't have my husband's K1. It won't be available until October. I also haven't made any IRA contributions in 2024.

On 04/06/2025 8:21 PM EDT Admin Team <[adminteam@incitetax.com](mailto:adminteam@incitetax.com)> wrote:

Hi Adrianna,

Thanks for sending over your documents so far! I have reviewed your completed Tax Organizer and there are some documents we are still needing from you. To see the documents we need to begin preparing your tax returns please log in to your [IRIS Client Portal](#). If there are requested documents that you don't have, please let us know.

We will also need Profit & Loss information for each of your businesses and rentals. Please use our [Income & Expense Tracker](#) to give us that information and upload it as an **Excel Spreadsheet**. There are tabs at the bottom on the template to accommodate multiple businesses and rentals, and two instructional video links on the top left-hand corner as well.

Let us know if you have any questions!

[#IRSSucks](#)

Kayla Mast

801-999-8295 / [adminteam@incitetax.com](mailto:adminteam@incitetax.com) / [www.incitetax.com](http://www.incitetax.com)

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