

# How Siegal Tax Law uses Tax Foresight to level the playing field



LAW FIRM



TAX  
PRACTITIONERS



NORTH AMERICA



<20 EMPLOYEES

## The Client

Siegal Tax Law is a small law firm focused on resolving and avoiding tax disputes. The firm provides a variety of advisory services designed to protect its clients from future tax disputes. Its dedication to providing exceptional service is achieved through a modern approach to technology and pricing.

Its use of technology, like Blue J's AI-powered tax software, enables the firm to punch above its weight and provide **timely, pragmatic, and cost-effective** solutions to tax disputes with uncompromising quality.

## The Objective

With fewer resources than a large firm, Siegal Tax Law sought ways to streamline its workflow and manage the large number of clients it regularly services.

Specifically, the firm wanted to expedite its intake process and its ability to quickly assess the strength of a client's case. Beyond improving intake, the firm also wanted to increase the speed of its research without trading off on comprehensiveness.

Without an army of juniors to do lengthy legwork, the firm turned to Tax Foresight as a way to supercharge its intake, early-stage research and competitiveness with its larger counterparts.

## How Tax Foresight Helped

"Tax Foresight is the first step in our intake process," says Brandon Siegal, founder at Siegal Tax Law.

When a potential client calls and asks for help, Tax Foresight's thorough and straightforward questionnaires help the firm quickly organize the facts of a new case and consider the most likely outcome for the file.

## Key Outcomes



**3x reduction in time for initial intake process and case assessment process**



**Ability to help more clients by offering flexible fee arrangements**



**Documented proof of diligent research for client files**

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**-Brandon Siegal,  
Founder**

Tax Foresight’s predictions, based on historical decisions in the relevant case law, assist the firm in determining the strength of a client’s position and a benchmark to assess the level of effort the case may need. It also provides guidance for setting client expectations with respect to time, costs, and possible outcome.

Knowing when it is practical to offer different fee arrangements is key in helping the firm increase access to justice and legal representation. Not every file requires the same level of involvement; informing clients upfront of the approximate cost of advice ensures a layer of transparency that would be more difficult to offer without the use of Tax Foresight. Being able to provide a level of cost certainty when pricing makes clients feel more confident and at ease before fully engaging the firm.

Tax Foresight plays a key role in the firm's workflow process, giving Siegal Tax Law a leg up and the client peace of mind. In addition to research assistance with quick reports on relevant historical cases, the platform generates a client-ready, time-stamped report documenting the client provided answers on the relevant facts. Incorporating Tax Foresight into the file intake process provides consistency and demonstrates the rigor of the firm's elevated due diligence procedures.

“It’s important to make sure you’re operating in the most professional way that you can by using the best resources available,” notes Siegal. When running a leaner operation, the platform helps Siegal Tax Law confirm its instincts about a case and provides it with a roadmap of where to go next.

“You still have to do the real work—read the cases and analyze the facts—but as someone without a large team, this is a great resource to start your files.”

Backed by legal technology like Tax Foresight, Siegal Tax Law performs like a big firm when advocating for its clients.



It takes Tax Foresight users **3.5 minutes** to answer a short questionnaire and receive a data-driven prediction as to how a court would rule in their scenario.