

Case Review Worksheet

To request a case review, please **thoroughly** complete this worksheet and return it via email (_____) or fax (_____). Please allow up to 72 hours for a response. In order to conduct an accurate assessment of your situation and consider your case for representation, please answer all questions completely and thoroughly. If an item does not apply simply mark "NO" or "N/A".

Name: _____

Address: _____

City, State, ZIP: _____

Email address: _____

Best Phone Number: _____

Best days/times to call: _____

Amount owed to IRS: _____

Tax types owed: (personal income tax) (trust fund recovery penalty) (business income taxes)
(employment/unemployment taxes) other: _____

Do you currently have a Revenue Officer (IRS field agent) assigned to you? If so, what are the most recent actions they have taken against you or requests they have made? _____

Do you have any current deadlines for information or payments that you need to meet? _____

Have there been any IRS threats of levies, wage garnishments, or seizures? _____

What was the date and title of your last letter received from the IRS? _____

Have you paid your current Federal Tax Deposits or Estimated Tax Payments on time and in full? _____

Do you have any past due, unfiled tax returns? If yes, what years (or quarters) and tax forms have not been filed? _____

Do you have any existing written or verbal agreements with the IRS, including delays or extensions of collection action or agreements to make "Good Faith Payments" on a regular basis? _____

Have there been any recent bank account levies, seizures, wage garnishments, or other aggressive collections action? If so, when and what action was taken? _____

Please describe, in your own words, the circumstances that gave rise to your back tax liability:

Please describe any actions you or a representative have taken recently to address your tax matters: _____

Do you have any currently filed IRS Appeals in progress? If so, what is their status?: _____
