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## Case Review Worksheet

In order to perform an accurate assessment of your situation Please answer all questions. If an item does not apply answer "NO" or "NA". If extra space is needed, attach additional pages.

Return the complete worksheet via e-mail or fax.  
Please allow 3 business days for a response.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

Email address: \_\_\_\_\_

Best Phone Number: \_\_\_\_\_

Best days/times to call: \_\_\_\_\_

Fax Number: \_\_\_\_\_

How much do you owe the IRS? \_\_\_\_\_

Do you owe state taxes? \_\_\_\_\_ What state? \_\_\_\_\_ How much do you owe? \_\_\_\_\_

What type of taxes are owed? \_\_\_\_\_ personal income tax \_\_\_\_\_ trust fund recovery penalty  
\_\_\_\_\_ business income taxes \_\_\_\_\_ employment/unemployment taxes  
other: \_\_\_\_\_

1. Have you paid your current Federal Tax Deposits or Estimated Tax Payments on time and in full?
2. Do you have any past due/unfiled tax returns? If yes, what years (or quarters) and tax forms have not been filed?
3. What was the date and title of your last letter received from the IRS? (Usually there is a "form"/"letter" number in the upper or lower right corner of the letter)

