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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.

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 taxtrusbusiness income taxesemployment/unemployment to other:	st fund recovery penalty axes
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 (o not been filed?	r quarters) and tax forms have
3. What was the date and title of your last letter received from the IRS	S? (Usually there is a

"form"/"letter" number in the upper or lower right corner of the letter)

4.	Please describe, in your own words, the circumstances that gave rise to your tax liability:
5.	Please describe any actions you or a representative have taken recently to address your tax matters:
6.	Do you currently have a Revenue Officer assigned to you? If so, what are the most recent actions they have taken against you or requests they have made?
7.	Do you have any current deadlines for information or payments that you need to meet?
8.	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?
9.	Have there been any recent bank account levies, seizures, wage garnishments, or other aggressive collections action? If so, when and what action was taken?
10	. Do you have any currently filed IRS Appeals in progress? If so, what is the status?
11	. What are your expectations as to an outcome? What do you want to see happen?