# QUESTIONAIRE

**Are you in an open bankruptcy proceeding?**
- ◯ Yes
- ◯ No

**Have you filed all required federal tax returns?**
- ◯ Yes
- ◯ No

**Have you made all required estimated tax payments?**
- ◯ Yes
- ◯ No
- ◯ N/A

**If you are self-employed and have employees, have you submitted all required federal tax deposits?**
- ◯ Yes
- ◯ No
- ◯ N/A

**ZIP or postal code**

[ ]

**State**

Select Your State

**County**

Select Your County

**Total members of household**

[ ]

**Total members of household 65 years or older**

0

**Total IRS tax debt including penalties & interest (whole dollars)**

$

**What is the most recent tax year you are requesting to compromise?**
(For example, if you owe 1040 taxes for 2015, 2016 and 2018, enter 2018. If the most recent tax year is more than ten years old, please enter the year the tax return was filed. This assists us in the future income calculation of your offer.)

[ ]

ASSETS

**Total bank balances**
$

**Home market value**
$

**Home loan balance**
$

**Vehicle 1 equity**
$

**Vehicle 2 equity**
$

**Retirement account equity** (401k, IRA, etc.)
$

**Other real property equity**
$

**Other asset equity** (airplane, motorcycle, recreational vehicles, etc.)
$

**Stocks, bonds and other investments, etc.**
$

**Miscellaneous**
$

INCOME

Gross wages including Social Security, pensions, unemployment, etc

$

Interest and dividends

$

Distributions from partnerships, sub-S corporations, etc.

$

Net rental income

$

Net business income

$

Child support received

$

Alimony received

$

Additional Income

$

EXPENSES

Rent or mortgage and utilities
$

Total vehicles owned

Vehicle 1 loan or lease payment
$

Vehicle 2 loan or lease payment
$

Vehicle operating costs
$

Public transportation costs
$

Health insurance premiums
$

Life insurance premiums
$

Federal, state and local taxes
$

Court-ordered payments
$

Child dependent care costs
$

NOTES:

PLEASE EXPLAIN YOUR TAX CIRCUMSTANCES AND LEGAL NEEDS:

CHECK LIST FOR OIC

___ Copies of the most recent pay stub, earnings statement, etc., from each employer.

___ Copies of the most recent statement for each investment and retirement account.

___ Copies of the most recent statement, etc., from all other sources of income such as pensions, Social Security, rental income, interest and dividends (including any received from a related partnership, corporation, LLC, LLP, etc.), court order for child

___support, alimony, royalties, and rent subsidies.

___Copies of individual bank statements for the three most recent months. If you operate a business, copies of the six most recent

___statements for each business bank account.

___Copies of the most recent statement from lender(s) on loans such as mortgages, second mortgages, vehicles, etc., showing

___monthly payments, loan payoffs, and balances.

___List of Notes Receivable, if applicable.

___Verification of delinquent State/Local Tax Liability showing total delinquent state/local taxes and amount of monthly payments, if applicable.

___Documentation to support any special circumstances described in the "Explanation of Circumstances" on Form 656, if applicable.

___Attach a Form 2848, Power of Attorney, if you would like your attorney, CPA, or enrolled agent to represent you and you do not have a current form on file with the IRS.

___Completed and signed current Form 656.

NOTES: