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Paying Your Taxes—Applications

Intake Form: Tax Dispute

If you're facing an audit or other IRS action, you are probably very worried about how to deal with the problem. If you disagree with an IRS action, you may want to challenge the government, but that can be intimidating. To help put your mind at ease, you should find an attorney who has tax experience to help you through either process. You can help your tax attorney help you by completing this form, which provides basic information a lawyer needs in tax matters.

INFORMATION ABOUT YOU

Name: _____

Spouse's name (if you file jointly): _____

Address: _____

Telephone numbers (home, work, cell, pager): _____

Social Security Number: _____

Spouse's SSN (if you file jointly): _____

Date of birth: _____

Employment status: _____

Annual salary (to help determine your tax liability): _____

Other sources of income: _____

INFORMATION ABOUT YOUR TAX DISPUTE

Please provide copies of your tax returns from the last three years, plus returns, correspondence and documentation involved in your dispute.

Are you being audited? Y/ N

If yes, please describe the basis for the audit (to the best of your knowledge): _____

Have you ever been audited in the past? Y/ N

If yes, please describe how the audit was resolved (including any payment arrangements):

Are you facing another IRS action other than an audit? Y/ N

If yes, please describe: _____

Are you pursuing a dispute with the IRS? Y/ N

If yes, describe your complaint in as much detail as possible, providing dates and indicating whether you have supporting documentation (please provide copies): _____

Have you filed a formal complaint with the IRS? Y/ N

If yes, please describe and provide documentation: _____

Has your complaint been disposed of by the IRS? Y/ N

If yes, what was the outcome of the proceedings? _____

Did you complain to anyone at the IRS informally? Y/ N

If so, what was the response to your complaint? _____

What is your desired outcome? _____
