

GENERAL INFORMATION

Please use n/a to indicate not applicable.

TAXPAYER

Legal Full name:

First: _____ Middle: _____ Last: _____

Address: _____

Social Security Number: _____

TAX MATTERS

What best describes your current tax liability situation:

- Personal tax liability only Business tax liability only Both Business & Personal tax liability

INDIVIDUALS

If you are not current with filing your individual tax returns, please list the tax years for which you have not filed:

Do you file tax returns with your Spouse? Yes No Not Married

Spouse's Name: _____ Spouse's Social Security No. _____

***CURRENT TAX LIABILITY
QUESTIONS (PERSONAL)***

With respect to your current individual tax liabilities, please list the tax year(s), tax agency(s), and description of the matter in the table below. Provide our office with copies of recent tax notices.

Tax Year (s)	Tax Agency (e.g., IRS)	Description of Matter (Income, Employment, Payroll, Excise, Civil Penalty)

BUSINESSES

Do you own any businesses that have a tax liability? Yes No (If No, then skip this section)

If you are not current with filing business tax returns, please list the Type of return(s) and Year(s) or Period(s) for which you have not filed:

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***CURRENT TAX LIABILITY QUESTIONS
(BUSINESS)***

List the Tax Years, Tax Agency(s), Description of Matter, and your business name(s) AND provide us with any recent tax notices.

Tax Year (s)	Tax Agency (e.g., IRS)	Description of Matter (Income, Employment, Payroll, Excise, Civil Penalty)	Name of Business

If you have any other pertinent information that you feel we should be aware of, please describe:



PLEASE PROVIDE OUR OFFICE WITH ALL TAX NOTICES YOU HAVE RECEIVED