**INFORMATION REQUEST – COLLECTION ALTERNATIVES**

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| Instructions |
| 1. Please enter your financial information below (page one). This information will help us determine your ability to pay your IRS tax debt and evaluate which collection alternative is most appropriate for you.
* Enter the current value of all of your assets, including the current total value of your checking and savings accounts.
* Then, enter your monthly income and expense information. If your income and/or expenses vary from month to month, enter a three-month average. If necessary, you may enter estimates.
1. Attach the requested documents shown below (page two).
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| **ASSETS** |  | **INCOME** |
| **Cash** |  | **Monthly income** |
| Checking and savings accounts | $ |  | Monthly wages (taxpayer) | $ |
| Investment accounts | $ |  | Monthly wages (spouse) | $ |
| Retirement accounts | $ |  | Child support received | $ |
| Total cash  | $ |  | Social Security received | $ |
|  |  | Pension income | $ |
| **Real estate** |  | Unemployment compensation | $ |
| Primary residence | $ |  | Self-employment income | $ |
| Investment property | $ |  | Alimony received | $ |
| Other | $ |  | Other income | $ |
| Total real estate  | $ |  | **Total monthly income** | **$** |
|  |  |  |
| **Other assets** |  | **EXPENSES** |
| Cars | $ |  |
| Boats | $ |  | **Monthly expenses** |
| Motorcycles | $ |  | Food  | $ |
| RVs | $ |  | Clothing | $ |
| Other | $ |  | Cable/Internet | $ |
| Total other assets  | $ |  | Car payment (vehicle one) | $ |
|  |  | Car payment (vehicle two) | $ |
| **Total assets**  | **$** |  | Car maintenance/insurance | $ |
|  |  |  | Mortgage payment/rent | $ |
| Utilities (electricity/gas/water/trash) | $ |
|  |  | Telephone/cell phone | $ |
|  | Health insurance | $ |
|  | Out-of-pocket health costs | $ |
|  | Child care | $ |
|  | Child support or alimony – court ordered | $ |
|  | Estimated tax payment | $ |
|  | Other | $ |
|  | **Total monthly expenses** | **$** |

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| **Included** | **Documents we need from you** |
| [ ]  | Copy of IRS notices, if available |
| [ ]  | Last year’s Form 1040, *U.S. Individual Income Tax Return*, with all attachments |
| [ ]  | Last three months’ bank statements (including spouse, if applicable) |
| [ ]  | Copy of most recent pay stub (including spouse, if applicable) |
| [ ]  | Copy of year-to-date profit and loss statement, if self-employed |
| [ ]  | Bankruptcy filing documents, including date filed, date dismissed or discharged, petition number and location, and any anticipated increase or decrease of income  |
| [ ]  | Lawsuit documents, including filing location, representative and docket/case number, amount of suit, possible completion date and subject of suit |
| [ ]  | Past three months of loan statements showing total liability for all accounts (including spouse’s loan statements, if applicable) |
| [ ]  | Court-ordered payments, such as child support payments, including applicable court-ordered documents showing the amounts ordered to pay and proof of payments  |
| [ ]  | Past three months of credit card statements showing total liability for all accounts (including spouse’s credit card statements, if applicable) |
| [ ]  | Eviction, foreclosure and/or utility disconnection notice or other substantiation showing financial hardship |
| [ ]  | Three most recent investment account brokerage statements for all accounts. Types of accounts include 401(k), pension, IRA, etc. Each account statement must show the current fair market value.  |
| [ ]  | Property tax records for all property you (or your spouse, if applicable) own. Property owned may include a home, vacation home, car or boat. The records must show the assessed value of the property.  |
| [ ]  | All life insurance policy information, showing policy number, policy owner, current cash value and outstanding loan balance, if applicable |
| [ ]  | Documents showing any other asset or liability, including any notes receivable or payable |
| [ ]  | If you are a small business owner and/or partner or shareholder in a partnership or S corporation, include all Schedules K-1 from Form 1120S and Form 1065 |
| [ ]  | Purchase Agreement for Truck |
| [ ]  | Copy and cost of Health Insurance for the past three months |