



IRS Tax Case Review Form

A sales representative will contact you within 3 business days.

Today's date: _____

First Name:		Last Name:		Phone Number:	
Address:					
Email:		Type of Tax Owed:		Tax Period Owed:	
Estimated Amount Due:		Active Levy or Garnishment:		Any Deadlines:	
Have you been having any IRS threats of levies, wage garnishments, or seizures?					
What was the date and title of your last letter received from the IRS?					
Do you currently have a Revenue Officer assigned to you?					
Do you have any past due, unfiled tax returns and in from what year to what year? If any.					
Do you have any existing written or verbal agreements with the IRS?					
Have you paid your current Federal Tax Deposits or Estimated Tax Payment on time and in full, with partial agreement, or any specific plans?					
Please give details if you have taken any actions to address your tax situation?					
Do you have any filed IRS appeals pending or in progress?					
Any comments:					

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