MIS Tax Pros
ENROLLED AGENTS

Tax Resolution Worksheet

The optimal solution to dealing with back taxes can only be determined after analyzing your current financial situation. Please complete the following Tax Resolution Worksheet. We don't need exact numbers at this point. **Close approximations** are OK as this is only an initial review to see what we may be able to do for you. We'll have to firm up the numbers before serving the IRS with your case paperwork. If the tax matter relates to a joint return, please provide a separate questionnaire for your spouse. On that one, just put information that is not included on this one. For instance, each spouse may have a retirement plan, investment(s), or asset(s).

Important: For obvious reasons, please don't omit items or count things twice.

You can fax the completed worksheet to: 469.277.7015

You can also scan it and send as an email attachment to: kmitchell@MISTaxPros.com

It helps if you can attach a copy of your latest correspondence from the IRS.

An Enrolled Agent will review your information and contact you shortly.

Personal Information	
	Taxpayer's Name
	Age
	Spouse's Name
	Age
	Phone Number
	Email
Tax Debt	
	IRS Tax Debt Amount?
	IRS Tax Year(s) Owed?
	When were these tax returns filed?
	State Tax Debt Amount (If applicable)
	State Tax Year(s) Owed? (If applicable)
	When were the state tax returns filed? (If applicable)
Tax and Employment Status	
	Are you current in your tax return filing?
	If not, what year(s) are you missing?
	Did you file SINGLE or JOINT?
	Is there an active GARNISHMENT or LEVY?
	Is there an IRS Revenue Officer assigned?

	Do you have his/her contact information?
	Are you currently on a payment plan with the IRS? How much?
	Are you currently on a payment plan with the State? How much?
	Are you employed?
	What do you do for a living?

Financial Questionnaire	
General	
	State
	County
	Married/Single
	Legal Dependents
	Number of people that you support who are not your immediate family member
	Total number of people living in your household
Assets	
Assets (Properties)	
	Home 1 Value
	Home 1 Mortgage Balance
	Property 2 Value
	Property 2 Mortgage Balance
	Property 3 Value
	Property 3 Mortgage Balance
Assets (Vehicles)	
	Vehicle 1 (year/model/mileage)
	Vehicle 1 Value
	Vehicle 1 Loan Balance
	Vehicle 2 (year/model/mileage)
	Vehicle 2 Value
	Vehicle 2 Loan Balance
	Vehicle 3 (year/model/mileage)
	Vehicle 3 Value
	Vehicle 3 Loan Balance
	Vehicle 4 (year/model/mileage)
	Vehicle 4 Value
	Vehicle 4 Loan Balance
Assets (Investments)	
	Do you have any 401k, IRA, Retirement Accounts?
	Total Value?
	Total Amount Accessible?

Assets (Bank Accounts)	
	Are you paycheck to paycheck?
	Account 1 Avg. or current Balance
	Account 2 Avg. or current Balance
	Account 3 Avg. or current Balance
Assets (Investments)	
	Do you have stocks, bonds, mutual funds, CDs, money markets?
	What is the total value?
Assets (Life Insurance)	
	Do you have life insurance?
	Please list any WHOLE LIFE, Cash Value amounts. (Not face amounts)
Assets (Business)	
	Do you have Business Assets?
	If yes, what type?
	What is the value?
Assets (Other)	
	Do you have any other assets attached to your SSN?
	If yes, what type?
	What is the value?
Income	
Income (Yourself)	
	W2, 1099 or Self Employed?
	If W2, what is your gross monthly income before taxes?
	If Self Employed, what is your per year Adjusted Gross Income averaged over the last 3 years?
	If Self Employed, how much do you pay for estimated tax payments?
Income (Spouse)	
	W2, 1099 or Self Employed?
	If W2, what is your gross monthly income before taxes?
	If Self Employed, what is your per year Adjusted Gross Income averaged over the last 3 years?
	If Self Employed, how much do you pay for estimated tax payments?
Income (Other)	
	Other income? (child support, alimony, pension, rental income, SSI, etc.)
	How much do you receive from each?

Expenses	
Expenses (Housing)	
	How much is your mortgage or rent, including taxes, insurance, HOA, storage, parking?
Expenses (Utilities)	
	How much are your utilities? (electric, natural gas, trash, water, home phone & cellphones only).
	Note: Please do not include internet and cable.
Expenses (Transportation)	
	How much is your car payment vehicle 1?
	How many payments are left on vehicle 1?
	How much is your car payment vehicle 2?
	How many payments are left on vehicle 2?
	How much is your car payment vehicle 3?
	How many payments are left on vehicle 3?
	How much is your car payment vehicle 4?
	How many payments are left on vehicle 4?
Expenses (Healthcare)	
	How much is your health insurance? (medical, dental, vision, disability)
	What are your monthly out of pocket healthcare expenses?
Expenses (Credit Card #1)	
	Credit Card #1 Credit Limit
	Credit Card #1 Available Credit
	Credit Card #1 Monthly Minimum Pmt.
Expenses (Credit Card #2)	
	Credit Card #2 Credit Limit
	Credit Card #2 Available Credit
	Credit Card #2 Monthly Minimum Pmt.
Expenses (Credit Card #3)	
	Credit Card #3 Credit Limit
	Credit Card #3 Available Credit
	Credit Card #3 Monthly Minimum Pmt.
Expenses (Credit Card #4)	
	Credit Card #4 Credit Limit
	Credit Card #4 Available Credit
	Credit Card #4 Monthly Minimum Pmt.
Expenses (Credit Card #5)	
	Credit Card #5 Credit Limit
	Credit Card #5 Available Credit
	Credit Card #5 Monthly Minimum Pmt.

Expenses (Court Order)	
	Do you have any court ordered payments? (child support, alimony, judgments)
	How much is the monthly payment?
	How many payments are left?
	If you have child support, how old are the children and how much do you pay for each child?
Expenses (Child Care)	
	Do you have child care expenses?
	How much per month?
Expenses (Life Insurance)	
	Do you pay life insurance per month?
	How much per month?
Expenses (Student Loans)	
	Do you pay student loans?
	What is the balance?
	How much per month?
Expenses (Medical Bills)	
	Do you have any outstanding medical bills?
	What is the balance?
	How much per month?
Special Notes: **Please indicate how your tax problems came about?**	

Do you have the ability to scan documents and email them? ______________________________

How did you hear about MIS Tax Pros?