Summary of Taxpayer Contact

Taxpayer's Name:	Taxpayer's Identification Number:

In order to determine the appropriate resolution of your case, we need to calculate/verify your ability to pay the tax delinquencies, and ensure that you remain in current compliance with applicable filing and paying requirements. To assist us in doing so, please provide the following information/documents by the date required.

Information/Documents required	Date Required

Provide a completed Collection Information Statement (Form 433A)

Provide the most recent pay stub to verify year-to-date gross pay, withholding, deductions and net pay.

Provide the last 3 months worth information to verify the sources and amounts of other income.
   a. Examples would be rental income, alimony, child support, retirement pension, social security benefits, etc.

Provide 12 months of bank statements, beginning with
   a. All personal and business bank statements.

Provide a complete listing of IRA's, 401(K)'s, stocks, bonds, mutual funds, and savings bonds.
   a. Provide a copy of the most recent statement related to each item.

Provide a copy of the DMV Registration of all vehicles, recreational vehicles, motorcycles, trailers and/or mobile home.
   a. If a vehicle has a loan balance, provide the most recent statement.

Provide copy of the last 3 months of out-of-pocket medical expenses, not covered/reimbursed by insurance.

Provide a copy of the most recent mortgage statement related to all properties you hold title to,
   a. If residence is a rental, provide copy of the lease agreement, Provide proof of payment for the most recent month.

Provide copy of the most recent utilities (gas, electricity, water, trash collection) statements, cell/lan phones)

Provide verification of your Estimated (ES) Tax Payment requirements (Form 1040 related).
   a. For more information regarding ES payment requirements see WWW.IRS.GOV.
   b. Check should be addressed to Department of Treasury,
   c. If ES pymts are not required, please provide ES pymt calculation to verify

Due Date of Above Items:

Notification of Consequences of Failure to Provide Information: Your failure to provide the above information by the specified date(s) may require the IRS to take action such as issuing summonses, filing a Notice of Federal Tax Lien, and/or issuing you a Notice of Intent to Levy and Notice of Your Right to a Hearing, if one was not previously issued for this liability.

Revenue Officer Name Identification Number:	Date	Telephone Number: Fax Number:

Office Address