

TAX RESOLUTION QUALIFIER QUESTIONNAIRE

Tax Year 20__

Are you in an open bankruptcy proceeding?

What is your filing status? (e.g. Single, Married, Head of Household, etc.)

Do you own or rent?

What is your address?

Do you have retirement accounts? (401k, Stocks, Bonds, Crypto, etc.)

Have you filed all required federal tax returns?

Have you made all the required estimated tax payments?

If you are self-employed and have employees, have you submitted all required federal tax deposits?

Total members of the household

Total members of the household 65 years or older

Total IRS tax debt including penalties & Interest

What tax years do you owe to the IRS?

Name(s): _____

Address: _____

Phone number: _____

Email: _____

Signature

Date

