

# TAX DRx REMEDIES

(Please Print)

Potential Tax Problem Resolution Client

On-line/Phone Intake

## TAXPAYER

Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone: Daytime ( ) \_\_\_\_\_ - \_\_\_\_\_ Wk / Hm / Cell

Evening ( ) \_\_\_\_\_ - \_\_\_\_\_ Wk / Hm / Cell

E-mail: \_\_\_\_\_

## SPOUSE

Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Name \_\_\_\_\_

**BUSINESS OWNER:** [ ] Yes; [ ] No

Business Type: \_\_\_\_\_

**Renting?** ( ) Yes; ( ) No

**Own Home >>** 1 Fam ( ) - 2 Fam ( );  
3 Fam ( ) - 4 Fam ( )

**Date of Birth**

**Occupation**

TAXPAYER \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

SPOUSE \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Appt Date	Time	Location

## FILING STATUS >>

(Please Check One)

[ ] Single

[ ] Married filing joint return

[ ] Married filing separate return

[ ] Head of Household - with qualifying dependent

[ ] Qualifying Widow(er) - for 2 years after Death of Spouse

[ ] Separated from spouse? If so when? \_\_\_\_\_

How did you hear about our company?: \_\_\_\_\_

This is [ ] a 1040 Federal Income Tax Problem; [ ] NJ or NY State Tax; [ ] Payroll Tax Issue; [ ] Sale Tax Problem?

Are there any LIENS or WAGE LEVIES threats or in place at this time? [ ] Yes; [ ] No

If yes, Start Date? \_\_\_\_\_ For How Much? \$ \_\_\_\_\_ How Often? \_\_\_\_\_

Are there any returns that you are aware of that were not filed?: [ ] Yes; [ ] No, all returns were filed.

If yes, for what years or quarters?: \_\_\_\_\_

Approximately how much money do you owe? \$ \_\_\_\_\_

Have you ever owned a Business or been a partner in a Business where Trust Fund or Payroll Liability would have existed?

[ ] Yes; [ ] No, If yes, Name of Company \_\_\_\_\_ and Fed Id No \_\_\_\_\_

Have you ever established a payment plan with the IRS? [ ] Yes; [ ] No

If yes, what is the status of your Installment Agreement? [ ] Current; [ ] Paid; [ ] In DEFAULT

Have any bank accounts or other assets been seized? [ ] Yes; [ ] No

If yes, what asset? \_\_\_\_\_ Values of Asset Seized? \_\_\_\_\_

Have you ever filed Bankruptcy? [ ] Yes; [ ] No

If yes, When \_\_\_\_\_ and What Type [ ] Chapt 7, [ ] Chapt 13, [ ] Chapt 11 Bankruptcy.

Has the Bankruptcy been discharged? [ ] Yes; [ ] No

The fee for an initial consultation is **\$250** for (time); due at the time of the consultation. Our office accepts cash, checks, and all major credit cards.

Should you decide to retain TAX DRx to represent you and you would like us to begin work on your file immediately, be prepared to present a \$ \_\_\_\_\_ retainer fee. Upon receipt of your information from the IRS, TAX DRx will analyze the information and give you an explanation of your options for resolving your tax problem and the cost associated with each.

Additional Notes: \_\_\_\_\_

Sign Here >> \_\_\_\_\_ / \_\_\_\_\_ Date: \_\_\_\_\_

(Taxpayer)

(Spouse)

## DOCUMENTS NEEDED FOR INTERVIEW / FAX to 908-573-3060

>> **Most recent Tax Returns Filed, Copy of any Tax Returns under audit, and ALL IRS Letters and Notices**

\*\* Addition Notes continue on back page