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Fax Back to (832) 202-2500 or email to larry@weinstein-cpa.com

Name _____

Address _____

City State Zip _____

Best number to reach you _____

How did you hear about us? _____

How has this problem affected your life? Please rank order

Worried about Wage Garnishment?

Received a Wage Garnishment?

Worried about Bank Seizure?

Received a Bank Seizure?

Worried about Federal Tax Lien?

Stress on your relationship?

Worried about Effect on your credit?

What caused you to contact us?

Bank Levy Wage Levy/Garnishment "Final Notice of Intent to Levy" Letter

Have you been receiving IRS notices? Yes No

What is the last letter received? _____

How Long Have You Known about this Problem? _____

Have you had an IRS Problem in the past? Yes No

How did you solve it at that time? _____

Have you called or dealt with the IRS yourself in this matter? Yes No

Have you filed all of your returns? Yes No

Have you moved since your last tax return filing? Y N

Have you notified the IRS you moved by filing IRS Form 8822? Y N

Has an IRS Wage Garnishment been issued on your wages? Y N

If yes, when is the next payday _____

Has an IRS Bank Levy been received on your bank account? Y N

If yes, what date was levy received at bank _____

Have you filed/are you current on all of your tax returns? Y N

If no, what year was the last tax return that you filed? _____

Are you married? Y N

If yes, has your spouse filed their taxes? If so, what filing status?

Single Head of Household Married Filing Separately

Have you received a Letter 1058, "Final Notice of Intent to Levy"? Y N Date of Letter _____

How much does the IRS say that you owe? _____

What year(s) do the IRS say that you owe for? _____

Has the IRS prepared any returns for you (Substitute for Returns)? Y N Don't Know

Are you an Employee/W-2 Business Owner/Self Employed

Are you required to make estimated tax payments? Yes No

Are you current on your estimated tax payments? Yes No

If you have employees, are you current in your payroll tax deposits? Yes No

Do you know about the 7 possible solutions available to solve this problem? Yes No

What would make you happy/be an ideal solution to solve this problem?

On a scale of 1 to 10 (with 10 being the greatest), how motivated are you to resolve this IRS matter now?

Least 1 2 3 4 5 6 7 8 9 10 Greatest

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