

TaxFix Inc. 888-473-7778 toll free Fax Form to: 888-542-4255

Mailing Address all deliveries to: Tax Fix Inc. #425, 20475 Hwy 46 W. #180, Spring Branch TX 78070-6124

Client Questionnaire-ALL INFORMATION IS PRIVILEGED

Name _____ Spouse _____ File jointly? Y N #kids in home _____

Birth Dates _____

Address _____ Apt # _____ County _____

City/State/Zip _____ Levy notices? Dated ___/___/___

Hm ph () - _____ Wk ph () - _____ Email add _____ @ _____

Fax () - _____ Cell () - _____

IRS claims \$ _____ for years: _____ 1040/941?? Self Employed? Y N

Are tax returns filed up to date? Y N Years that need to be filed are _____

Own home? Low Estimated Value \$ _____ Owe on Home \$ _____ Home Equity Loan? \$ _____

401K bal _____ IRA bal _____ Stocks _____ Savings _____

Bankruptcy? Ch 7 Ch 13 Discharge Date _____ How are you paid? _____

Anything else you haven't told me about? Other income or obligations? Suing anyone or being sued? Judgments?

All amounts in table are monthly amounts. To calculate monthly take weekly X4.3, Bi Weekly x 2.16

Income	Mr.	Ms.	1st Mortgage		Child Care Exp		
Gross Wages			2nd Mortgage		Child Support		
Business Income			Or Rent		Judgments		
Other Inc (list):			Electricity		Tax Ded/Pay		
Child Supp			Gas		Other Ded		
Alimony			Water		Life Ins		
Soc Sec			Telephone		Secured Debt Pmts		
Retirement Pay			Cell Phone		Other Debt Pmts(list)		
Disability Pay			Other Utilities		Car Pmt		
Earned Inc Cr.			Home Insur		RV or Boat		
Royalties			Prop Tax		Health Ins		
Interest/Dividends			Pers Prop tax		Other Health Care		Rx,Dentist,Chiro,Co pays, Deductibles

Assets; I need your lowest estimate of sale value today in current condition

Auto 1	\$	Mk	Mdl	Year	Condition	Miles
Auto 2		Mk	Mdl	Year	Condition	Miles
Residence		Condition?			Repairs needed? \$	
Other Real Estate		Condition?			Repairs needed? \$	
Cash on hand						
Banks/CU/Brokerage/etc.						
Retirement Fund		401K?	IRA?	Mr?	Mrs?	

List Special Hardships you are under that might help your case _____

Any other Special Conditions or Problems worrying you? _____

Once you hire me I can probably prevent enforced collection action in about 10 days. However, this cannot be guaranteed or assured until I talk to the IRS Representatives. Even then, there may be more than one office after you or the IRS may not follow their own rules and regulations which requires more work. I work on flat fees with no additional charges except for problems caused by your own delays or inaccurate/incomplete data in giving me what I request to solve the problem for you. Generally this is not an issue.

Randy Anson.