

#### INTERNAL TAX SETTLEMENT APPLICATION

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| PERSONAL INFORMATION  |   |  |  |  |  |
|---|---|--|--|--|--|
| APPLICANT:  | SPOUSE:   |  |  |  |  |
|   | _ SOCIAL SECURITY #:  |  |  |  |  |
| DATE OF BIRTH   | _ DATE OF BIRTH:  |  |  |  |  |
| PHONE NUMBER:   | PHONE NUMBER:   |  |  |  |  |
|   | _EMAIL:_  |  |  |  |  |
| HOME ADDRESS:   |   |  |  |  |  |
| DO YOU: $\square$ OWN YOUR HOME $\square$ RENT $\square$ O                    | <b>THER</b> (specify e.g., share rent, live with relative, etc.): |  |  |  |  |
| IS YOUR RENT OR MORTGAGE IN DEFUALT? Y  | / <b>N</b>  |  |  |  |  |
| TA  | AX DEBT   |  |  |  |  |
|   | ATT A DO DATE   |  |  |  |  |
| ESTIMATED PERSONAL IRS TAX DEBT: \$   | YEARS DUE:  |  |  |  |  |
| FISCAL YEARS OF UN-FILED FEDERAL TAX RETESTIMATED PERSONAL STATE TAX DEBT: \$ | YEARS DUE:  |  |  |  |  |
| FISCAL YEARS OF UN-FILED STATE TAX RETUR                                      |   |  |  |  |  |
|   | 2.0   |  |  |  |  |
| EMPLOYMENT INFORM   | IATION FOR WAGE EARNER  |  |  |  |  |
| APPLICANT   | SPOUSE  |  |  |  |  |
| EMPLOYER:   | EMPLOYER:   |  |  |  |  |
| POSITION:   | POSITION:   |  |  |  |  |
| START DATE:   | START DATE:   |  |  |  |  |
| GROSS MONTHLY INCOME:   | GROSS MONTHLY INCOME:   |  |  |  |  |
| NET MONTHLY INCOME:   | NET MONTHLY INCOME:   |  |  |  |  |

(PLEASE USE A SEPARATE PAGE TO INCLUDE ANY ADDITIONAL EMPLOYMENT INFORMATION)

### **SELF-EMPLOYMENT INCOME**

(SOLE PROPRIETOR ONLY, NOT INCORPORATED OR LLC)

| APPLICANT                                | ADDITIONA        | L INCOME                        | SPOUSE   |  |  |  |
|--|------------------|---------------------------------|--|--|--|--|
| ( )                                      |                  |                                 |  |  |  |  |
| Primary phone:                           | Website address: | Gross Monthly Income:           |  |  |  |  |
| Business address (street, city, state, Z | P code):         | Brief description of the nature | Brief description of the nature of the business: |  |  |  |
| Business name, DBA or "Trade Nan         | ne"              | County of business location     | Date Opened                                      |  |  |  |

|           | ADDITIONAL INCOME |        |
|-----------|-------------------|--------|
| APPLICANT |                   | SPOUSE |
|           |                   |        |

| UNEMPLOYMENT BENEFITS | \$<br>UNEMPLOYMENT BENEFITS | \$ |
|-----------------------|-----------------------------|----|
| ALIMONY               | \$<br>ALIMONY               | \$ |
| CHILD SUPPORT         | \$<br>CHILD SUPPORT         | \$ |
| SOCIALSECURTY         | \$<br>SOCIALSECURTY         | \$ |
| DISABILITY            | \$<br>DISABILITY            | \$ |
| WORKERS COMPENSATION  | \$<br>WORKERS COMPENSATION  | \$ |
| PENSION               | \$<br>PENSION               | \$ |

### **OTHER INCOME**

| DESCRIPTION OF OTHER INCOME | GROSS | NET | FREQUENCY |
|-----------------------------|-------|-----|-----------|
|                             | \$    | \$  |           |

### **DEPENDENTS**

| NAME | AGE | RELATIONSHIP | CLAIMED AS<br>DEPENDENT ON<br>1040 |
|------|-----|--------------|------------------------------------|
|      |     |              | YES / NO                           |

## PERSONAL MONTHLY EXPENSES

| FOOD, GROCERIES, DINING OUT                     | \$<br>GAS// HEATING OIL | \$ |
|---|-------------------------|----|
| MONTHLY RENT PAYMENT                            | \$<br>ELECTRIC          | \$ |
| VEHICLE MAINTENANE, REPAIR, PARKING, GAS & TOLL | \$<br>WATER             | \$ |
| AUTO INSURANCE                                  | \$<br>CABLE             |    |
| PUBLIC TRANSPORTATION COSTS                     | \$<br>HOME PHONE        | \$ |
| HEALTH INSURANCE PREMIUMS                       | \$<br>INTERNET          | \$ |
| PRESCRIPTIONS, MEDICAL SUPPLIES, CO-PAYS, ETC.  | \$<br>CELL PHONE        | \$ |
| ALIMONY, CHILD SUPOORT                          | \$<br>GARBAGE PICK UP   | \$ |
| CHILD /DEPENDANT CARE                           | \$<br>SEWER             | \$ |
| PROPERTY MAINTENANCE /REPAIR                    | \$<br>CLOTHING          | \$ |
| LANDSCAPING & SNOW PLOWING                      | \$<br>LAUNDROMAT        |    |
| HOMEOWNERS ASSOCIATION DUES                     | \$<br>DRY CLEANING      |    |
| TUITION / CONTINUING EDUCATION                  | \$<br>KIDS ACTIVITES    |    |
| LIFE INSURANCE PREMIUMS                         | \$<br>GYM MEMBERSHIP    |    |
| HOUSEKEEPING AND PERSONAL CARE SUPPLIES         | \$<br>RELIGION          |    |
| OTHER:  | \$                      |    |
| OTHER:  | \$                      |    |

## CREDIT CARDS

| CREDIT CARD NAME | CARD<br>BALANCE | MINIMUM<br>MONTHLY<br>PAYMENT | APPLICANT<br>SPOUSE<br>JOINT | CURRENT<br>OR<br>IN<br>DEFAULT | MONTHS<br>IN<br>DEFAULT | PAID<br>THROUGH<br>BUSINESS |
|------------------|-----------------|-------------------------------|------------------------------|--------------------------------|-------------------------|-----------------------------|
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |
|                  | \$              | \$                            | A/S/J                        | C/D                            |                         | Y/N                         |

# VEHICLE LOANS OR LEASES (cars, boats, motorcycles, etc.)

| FINANCE / LEASING<br>COMPANY | FINANCED<br>OR<br>LEASED | LOAN BALANCE<br>(IF FINANCED) | MONTHLY<br>PAYMENT | APPLICANT<br>SPOUSE<br>JOINT | CO-SIGN<br>FOR<br>OTHER | CURRENT<br>OR<br>IN DEFAULT | PAID<br>THROUGH<br>BUSINESS | VEHICLE<br>DESCRIPTION |
|------------------------------|--------------------------|-------------------------------|--------------------|------------------------------|-------------------------|-----------------------------|-----------------------------|------------------------|
|                              | F/L                      | \$                            | \$                 | A/S/J                        | Y/N                     | C/D                         | Y/N                         |                        |
|                              | F/L                      | \$                            | \$                 | A/S/J                        | Y/N                     | C/D                         | Y/N                         |                        |
|                              | F/L                      | \$                            | \$                 | A/S/J                        | Y/N                     | C/D                         | Y/N                         |                        |

### **VEHICLES** - Excluding Leased Vehicles (Including Motor Homes, Campers, Motorcycles, Boats, Trailers, etc.)

| VEHICLE<br>DESCRIPTION | MAKE | MODEL | YEAR | CONDITION<br>POOR, FAIR<br>GOOD | MILEAGE | AMOUNT OWED | Applicant<br>Spouse<br>Jointly |
|------------------------|------|-------|------|---------------------------------|---------|-------------|--------------------------------|
|                        |      |       |      | P/F/G                           |         | \$          | H /W / J                       |
|                        |      |       |      | P/F/G                           |         | \$          | H /W / J                       |
|                        |      |       |      | P/F/G                           |         | \$          | H /W / J                       |
|                        |      |       |      | P/F/G                           |         | \$          | H /W / J                       |

#### INSTALLMENT / STUDENT LOANS

| CREDITOR | LOAN<br>BALANCE | MONTHLY<br>PAYMENT | APPLICANT<br>SPOUSE<br>JOINT | CURRENT<br>OR<br>IN DEFAULT | CO-SIGN<br>FOR<br>OTHER | FEDERAL OR PRIVATE (Student loans only) |
|----------|-----------------|--------------------|------------------------------|-----------------------------|-------------------------|---|
|          | \$              | \$                 | A/S/J                        | C/D                         | Y/N                     | F/P                                     |
|          | \$              | \$                 | A/S/J                        | C/D                         | Y/N                     | F/P                                     |
|          | \$              | \$                 | A/S/J                        | C/D                         | Y/N                     | F/P                                     |
|          | \$              | \$                 | A/S/J                        | C/D                         | Y/N                     | F/P                                     |

# REAL ESTATE OWNED (Include separate page if necessary)

| PROPERTY ADDRESS | LOAN<br>BALANCE(S) | MORTGAGE<br>PAYMENTS | TAXES & INSURANCE | RENTS<br>RECEIVED | PROPERTY<br>VALUE | OWNER: Applicant Spouse Jointly |
|------------------|--------------------|----------------------|-------------------|-------------------|-------------------|---------------------------------|
|                  | \$                 | \$                   | \$                | \$                | \$                | A/S/J                           |
|                  | \$                 | \$                   | \$                | \$                | \$                | A/S/J                           |
|                  | \$                 | \$                   | \$                | \$                | \$                | A/S/J                           |

## INVESTMENTS (Stocks, bonds, mutual Funds, IRA, Government Securities, money Market Funds)

| TYPE | ISSUER | CURRENT VALUE | Applicant / Spouse/ Joint |
|------|--------|---------------|---------------------------|
|      |        | \$            | A/S/J                     |
|      |        | \$            | A/S/J                     |
|      |        | \$            | A/S/J                     |
|      |        |               | A/S/J                     |

# BANK OR CREDIT UNION ACCOUNTS (Checking, savings, certificate of deposit 'CD")

| NAME OF INSTITUTION | ACCOUNT NUMBER | ACCOUNT TYPE | VALUE | Applicant / Spouse/<br>Joint |
|---------------------|----------------|--------------|-------|------------------------------|
|                     |                |              | \$    | A/S/J                        |

### RETIREMENT ACCOUNTS (401k, 403B, Profit Sharing, Employer Match Programs, etc.)

| TYPE | ISSUER | CURRENT VALUE | Applicant / Spouse/ Joint |
|------|--------|---------------|---------------------------|
|      |        | \$            | A/S/J                     |
|      |        | \$            | A/S/J                     |
|      |        | \$            | A/S/J                     |

#### **OTHER ASSETS**

| ТҮРЕ                                      | CURRENT VALUE | Applicant / Spouse/ Joint |
|---|---------------|---------------------------|
| CASH ON HAND                              | \$            | A/S/J                     |
| CASH SURRENDER VALUE OF LIFE INSURANCE    | \$            | A/S/J                     |
| JUDEGMENTS OR SETTLEMENTS RECEIVABLE      | \$            | A/S/J                     |
| CRYPTO CURRENCY / NON-FUNGIBLE TOKENS     | \$            | A/S/J                     |
| COLLECTABLES / ANTIQUES/ ARTWORK          | \$            | A/S/J                     |
| FURNITURE / ELECTRONIC / PERSONAL AFFECTS | \$            | A/S/J                     |
| JEWELERY                                  | \$            | A/S/J                     |
| PATENTS / COPYRIGHTS                      | \$            | A/S/J                     |

## OTHER INFORMATION

| Have you been audited? YES / NO Do you owe taxes as the result of an audit? YES / NO                     |
|--|
| Have your wages been garnished YES / NO Have your bank Accounts been levied? YES / NO                    |
| Has the IRS placed a lien on your property? YES / NO   |
| Are you currently in filing compliance with all state and federal taxes? YES / NO                        |
| If "No", identify tax type and period:   |
| If the tax liability was business related, has the business been dissolved? Y/N Date dissolved?          |
| Have you transferred any assets including real property for less than their full value in the past ten   |
| years? YES / NO If "Yes", List Assets:   |
| Date transferred: Value at time of transfer: To Whom:  |
| Is a foreclosure proceeding pending on any real estate that you own or have an interest in? YES / NO     |
| Do you have any judgments against you? YES / NO  |
| Are you a party to any pending lawsuit? YES / NO   |
| Is there a likelihood that you will receive assets or income from an estate in probate? YES / NO         |
| If "Yes", from whom? Relationship:   |
| Are you a trustee, fiduciary, or contributor of a trust YES / NO   |
| Do you have a safe deposit box (business or personal) YES / NO   |
| Have you previously petitioned the IRS or NYS for settlement of any tax liability? YES / NO              |
| If "Yes", identify tax type and perioddate of contact:   |
| Description of dealings:   |
| Are you or any business that you own currently under bankruptcy court jurisdiction? YES / NO             |
| Have you or any business that you have owned previously filed for bankruptcy? YES / NO                   |
| Have you ever been party to any litigation involving the IRS/USA (including any tax litigation) YES / NO |
| In the past 10 years, have you lived outside of the U.S. for 6 months or longer? YES / NO                |
| Do you have any assets or own any real property outside the U.S.? YES / NO                               |
| Do you have any funds being held in trust by a third party? YES / NO                                     |
| Do you anticipate any decrease in household income in the next two years? YES / NO                       |
| If "Yes", how much will the income decrease? \$  |
| Why will it decrease?  |
| Do you anticipate any increase in household income in the next two years? YES / NO                       |
| If "Yes", how much will the income increase? \$  |
| Why will it increase?  |