

**IRS Offer in Compromise  
Pre-Qualifier Tool**

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Complete the following information which we will use to determine if you meet the IRS Pre-Qualifications of an Offer in Compromise

Assets:	Dollar Amount
(1) Bank Checking Account	
(2) Bank Savings Account	
(3) Home Market Value	
(4) Home Loan Balance	
(5) Vehicle 1 Equity	
(6) Vehicle 2 Equity	
(7) Retirement Account Balance	
(8) Other Real Property Owned	
(9) Other Assets	
(10) Stocks, Bonds, Other Investments	
(11) Misc.	

<b>Total Assets</b>	<b>\$ -</b>
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Income:	Dollar Amount
(12) Gross Wages	
(13) Interest & Dividends	
(14) Distributions from Partnerships, S-Corps, etc	
(15) Net Rental Income	
(16) Net Business Income	
(17) Child Support Received	
(18) Alimony Received	
(19) Additional Income	

<b>Total Income</b>	<b>\$ -</b>
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Expenses:	Dollar Amount
(20) Mortgage & Utilities	
(21) Vehicle Loan Payments	
(22) Vehicle Operating Costs	
(23) Public Transportation Costs	
(24) Health Insurance Premiums	
(25) Life Insurance Premiums	
(26) Federal, State, Local Taxes	
(27) Court-Ordered Payments	
(28) Child Dependent Care Costs	
(29) Additional Expenses	

<b>Total Expenses</b>	<b>\$ -</b>
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General Information:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

# of Members in Household: \_\_\_\_\_

# of these over age 65: \_\_\_\_\_

Your Total IRS Debt: \$ \_\_\_\_\_

Are/Have you:

- |   |   |   |     |
|---|---|---|-----|
| (1) Currently in Bankruptcy Proceeding  | Y | N |     |
| (2) Filed all required Federal tax returns  | Y | N |     |
| (3) Made all required estimated tax payments  | Y | N | N/A |
| (4) If self-employed & have employees, have you submitted all required federal tax deposits | Y | N | N/A |

Do you have an Exceptional Circumstance such as serious illness, where paying your taxes in full might impair your ability to provide for yourself and family?

Y    N    N/A

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