

Your Name(s): \_\_\_\_\_

Your Telephone #: \_\_\_\_\_

**PERSONAL TAX ISSUES – INITIAL QUESTIONS**

1) Who are your tax issues with and what are the years?

Check below	Entity	Years
	IRS	
	MDOR	
	City of St. Louis	
	Other	

2) Estimated total liability (taxes, interest & penalties)? \$ \_\_\_\_\_

3) Have you received a Levy Notice? Yes \_\_\_\_\_ No \_\_\_\_\_

4) Have you received a Notice of Tax Lien? Yes \_\_\_\_\_ No \_\_\_\_\_

5) Is there anything else you want to add? \_\_\_\_\_

# Now what?

- 1) You can call us right now @ 314-644-0303
- 2) You can fax your answers to Tracy A. Brown @ 314-644-0333
- 3) You will receive a phone call to discuss a strategy

**BUSINESS TAX ISSUES – INITIAL QUESTIONS**

**Your Name(s):** \_\_\_\_\_

**Your Telephone #:** \_\_\_\_\_

**Company Name:** \_\_\_\_\_

1) Your Company Status: President \_\_\_\_\_ Other: \_\_\_\_\_

2) What is your ownership interest? 100% \_\_\_\_\_ Less than 100% @ \_\_\_\_\_ %

3) Type of Entity? Please check below:

<input type="checkbox"/>	Sole Proprietorship
<input type="checkbox"/>	S Corporation
<input type="checkbox"/>	C Corporation
<input type="checkbox"/>	Partnership
<input type="checkbox"/>	LLC

4) Type of Tax Issue? Please check below:

<input type="checkbox"/>	Employment Withholding
<input type="checkbox"/>	Sales Tax
<input type="checkbox"/>	Other
<input type="checkbox"/>	Other

5) Does your business have a Liquor License? \_\_\_\_\_

6) What years / quarters are involved? \_\_\_\_\_

7) Have all Tax Returns been filed? \_\_\_\_\_

8) Estimated total liability (taxes, interest & penalties)? \_\_\_\_\_

9) Have you received a Levy Notice? \_\_\_\_\_ Notice of Tax Lien? \_\_\_\_\_

10) Is there anything else you want to add? \_\_\_\_\_

# Now what?

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- 2. You can fax your answers to Tracy A. Brown @ 314-644-0333**
- 3. You will receive a phone call to discuss a strategy**