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Offer in Compromise Worksheet

YOUR CONTACT INFORMATION

Your name	
Your address	
City, State and Zi	
County	
E-mail address	
Telephone	
Age	
Occupation	

SPOUSE CONTACT INFORMATION

Spouse name	
E-mail address	
Telephone	
Age	
Occupation	

DEPENDENTS

NAME	RELATIONSHIP	AGE

YOUR TAX LIABILITIES – INCOME TAX

IRS – APPROXIMATE TOTAL	
CA FTB – APPROXIMATE TOT.	
OTHER STATE	
APPROXIMATE TOTAL	

SPOUSE TAX LIABILITIES – INCOME TAX (IF LIABILITIES ARE JOINT, LEAVE BLANK)

IRS – APPROXIMATE TOTAL	
CA FTB – APPROXIMATE TOT.	
OTHER STATE	
APPROXIMATE TOTAL	

YOUR CURRENT MONTHLY INCOME INFORMATION AS AN EMPLOYEE

NAME OF EMPLOYER	
HOW LONG YOU HAVE WORKED THERE	
YOUR AVERAGE MONTHLY GROSS SALARY	
ARE TAXES BEING WITHHELD (YES/NO)?	
DO YOU HAVE A 401(K) RETIREMENT ACCT?	
IF SO, APPROXIMATE BALANCE IN ACCT	
ARE WAGES BEING GARNISHED (YES/NO)?	

SPOUSE'S CURRENT MONTHLY INCOME INFORMATION AS AN EMPLOYEE

NAME OF EMPLOYER	
HOW LONG SHE HAS WORKED THERE	
HER AVERAGE MONTHLY GROSS SALARY	
ARE TAXES BEING WITHHELD (YES/NO)?	
DOES SHE HAVE A 401(K) RETIREMENT ACCT?	
IF SO, APPROXIMATE BALANCE IN ACCT	
ARE WAGES BEING GARNISHED (YES/NO)?	

YOUR MONTHLY SELF-EMPLOYMENT INFORMATION (IF APPLICABLE)

BUSINESS NAME (DBA)	
NATURE OF THE SERVICE OFFERED	
HOW LONG IN THIS BUSINESS	
BUSINESS LOCATION (CITY/STATE)	
APPROX MONTHLY NET INCOME	

SPOUSE'S MONTHLY SELF-EMPLOYMENT INFORMATION (IF APPLICABLE)

BUSINESS NAME (DBA)	
NATURE OF THE SERVICE OFFERED	
HOW LONG IN THIS BUSINESS	
BUSINESS LOCATION (CITY/STATE)	
APPROX MONTHLY NET INCOME	

OTHER **MONTHLY** INCOME SOURCES (COMBINED - YOU AND SPOUSE, IF APPLICABLE)

SOCIAL SECURITY	
RETIREMENT (PAST EMPLOYMENT)	
OTHER PENSION MONTHLY INCOME	
ALIMONY (SPOUSAL SUPPORT)	
CHILD SUPPORT	
UNEMPLOYMENT	
NET RENTAL INCOME	
OTHER INCOME (TYPE AND MONTHLY AMT)	

CURRENT LIQUID ASSETS

CASH ON HAND	
CASH IN ALL CHECKING ACCOUNTS	
CASH IN ALL SAVINGS ACCOUNTS	
TOTAL IN 401(K) ACCOUNTS	
TOTAL IN ALL OTHER RETIREMENT ACCOUNTS	
TOTAL IN INVESTMENTS (STOCKS, BONDS, ETC)	
OTHER LIQUID ASSETS (TYPE/AMOUNT)	

REAL PROPERTY ASSETS

DESCRIPTION	LOCATION (CITY/ST)	CURRENT MKT VALUE	TOTAL MORTGAGE

VEHICLES

YEAR/MAKE/MODEL	MILEAGE	CURRENT VALUE	LOAN BAL, OR LEASED

OTHER ASSETS

DESCRIPTION	CURRENT VALUE	LOAN OR LIEN AMOUNT

