Member of the Freedom Financial Network, LLC

freedom TAX RELIEF

Tax Resolution Tracking Form

Tax Resolution Tracking Form		Tax Liability ($ amount):	
		Requested Solution:	
Client Name:		SSN #:	
Spouse Name:		SSN #:	
Home Phone:	Home Fax:	E-mail:	
Work Phone:	Work Fax:	Cell/Other:	
Street Address:	City, State, & Zip:		
Company Name (if applicable):		FEIN # (if applicable):	

Tax Liability Information

Case Status? IRS Contact & Phone #:		
Case Status? State Contact & Phone #:		
In Collection: Yes / No (Circle one)	Lien or Levy Filed (details):	
IRS Liabilities: Yes / No (Circle one)	IRS Tax $ Owed:	IRS Returns Unfiled (years):
State Liabilities: Yes / No (Circle one)	State Tax $ Owed:	State Returns Unfiled (years):
Current Year Estimated Tax:	Current Year Withholding:	
County of Residence?	# of Dependents (and Ages):	
Tax Notes:		

Assets & Liabilities			Household Income and Expenses	
Description	**Fair Market Value**	**As Adjusted**	**Description**	**Amount (MONTHLY)**
Home Value:			Client Gross Wages:	
- Mortgage:			Spouse Gross Wages:	
Other Real Property:			Self Employment Income:	
- Mortgage:			Other Income #1:	
IRA, 401(k):			Other Income #2:	
- Any 401(k) Loan:			**Total Income =**	
Auto #1:			Food, Clothing, Misc Expenses:	
- Amount Owed:	(Months Left: _____)		Rent or Mortgage:	
Auto #2:			+ RE Tax & Insurance:	
- Amount Owed:	(Months Left: _____)		+ Utilities:	
Stocks:			= Total Housing Exp:	
Checking #1:			Auto #1 Monthly Cost (lease or loan):	
- Adjustment for up to One Month's Exp:			Auto #2 Monthly Cost (lease or loan):	
Checking #2:			Health Care Monthly Expenses (include premiums for medical, dental, vision, etc.):	
Savings:				
Cash:			Taxes (or estimate 28% of income):	
Life Insurance Value:			Child Care & Alimony:	
Other Assets:			Child or Dependent Care:	
States with no income tax: AK, FL, NH, NV, SD, TN, TX, WA, and WY			Payments on Secured Loans (not credit cards):	
Community property states: AZ, CA, ID, LA, NV, NM, TX, WA, and WI			Other Expenses (write in details):	
			Total Expenses =	

Please Complete & Fax to: **888-382-8869 ATTN: Jesse Niesen**

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Notes

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