## Form A – Claim Form and Document Checklist

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2017 Tax Documents
I owed \$ (amount) in federal income tax for Tax Year 2017.
I have paid \$ (amount) in fees and penalties for Tax Year 2017.
I have paid \$ (amount) in interest for Tax Year 2017.
My current remaining balance to the IRS for Tax Year 2017 is \$ (amount based
on CP19 or CP89, printout of online portal, or other IRS documents).
I pay monthly payments to the IRS in the amount of \$ (amount) for Tax Year 2017
I have approximately months remaining to pay off my federal income taxes for Tax Year 2017 (divide
current remaining balance by amount of monthly payments).
2017 Tax Return showing federal income tax owed to the IRS
Letters, Bills, Payment Plan, or Installment Agreement from the IRS for 2017 Tax Year (including any IRS Letter 2840C, Forms 9465 or 433-D, Notices CP14 or CP80, printouts of online portal, or other IRS documents)
Expenses Related to Tax Advice
I paid \$ (amount) for tax advice or tax preparation services for Tax Year 2016
Receipts or other documentation for 2016 Tax Year Preparation Services
Receipts or other documentation for 2016 Tax Year advice or counseling
I paid \$ (amount) for tax advice or tax preparation services for Tax Year 2017
Receipts or other documentation for 2017 Tax Year Preparation Services
Receipts or other documentation for 2017 Tax Year advice or counseling

## **Other Expenses**

I incurred additional expenses in the amount of \$             (total amount reflected in
documents below) as a result of the federal income tax I owed for Tax Year 2016.
Documentation of late rent fees as a result of debt owed to the IRS for Tax Year 2016
Documentation of late credit card fees as a result of debt owed to the IRS for Tax Year 2016
Documentation of late car payment fees as a result of debt owed to the IRS for Tax Year 2016
Documentation of other expenses as a result of debt owed to the IRS for Tax Year 2016
I incurred additional expenses in the amount of \$ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \
Documentation of late rent fees as a result of debt owed to the IRS for Tax Year 2017
Documentation of late credit card fees as a result of debt owed to the IRS for Tax Year 2017
Documentation of late car payment fees as a result of debt owed to the IRS for Tax Year 2017
Documentation of other expenses as a result of debt owed to the IRS for Tax Year 2017

## Form B – Verification of Other Expenses

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## Form C – Verification of Tax Services

Please fill out the following form only if you are requesting reimbursement for tax preparation services or tax advising for the 2016 or 2017 Tax Years and if it was not your regular practice to use a tax preparation service or tax advising prior to Tax Year 2016.

Please note that in addition to this form, you must also submit receipts or other documentation demonstrating the amount that you paid for tax preparation services or tax advising in order to get reimbursed.

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