MBA FINANCIAL TAX & ACCOUNTING LLC | TaxDebtWise.com
IRS & State Tax Resolution | Tax Preparation | Accounting | Debt-to-Wealth Strategies
4106 E. Wilder Road #288, Bay City, MI 48706 | (989) 686-6633 | Toll-Free (877) 306-2246 | Fax (989) 364-2024
trustmba@aol.com | www.taxdebtwise.com | Secure Portal: mbafinancial.logicsportal.com

# TAX RESOLUTION INTAKE FORM

TaxDebtWise by MBA Financial Tax & Accounting LLC

Complete what you know. You do not need to have every notice, tax year, or balance organized before contacting us. This intake identifies urgency, filing compliance, collection pressure, and the information needed for an Investigation Analysis and strategy discussion.

URGENT DEADLINE: Call (989) 686-6633 immediately before relying on this form if you have a Final Notice, bank levy, wage garnishment, threatened seizure, audit/exam request, appeal or hearing notice, court date, or any response deadline within 14 days.

SECURITY: Do not enter Social Security numbers, dates of birth, bank-account numbers, passwords, complete tax returns, transcripts, or other highly sensitive records on an unsecured copy. Use the secure client portal for confidential documents.

## 1. CONTACT & CLIENT INFORMATION

First Name * ______________________________

Last Name * ______________________________

Email Address * ______________________________

Best Phone Number * ______________________________

Street / Mailing Address ______________________________

City, State & ZIP ______________________________

Best Time to Contact ______________________________

Preferred Contact: ☐ Call ☐ Text ☐ Email ______________________________

You are seeking help as:

☐ Individual
☐ Business Owner / Officer
☐ Both Individual & Business
☐ Estate / Trust / Other

Business / Entity Name, if applicable:

______________________________________________

Current tax professional, attorney, or other representative, if any:

______________________________________________

## 2. TAX PROBLEM OVERVIEW

Primary tax issue(s):

☐ Back Taxes / Balance Due
☐ Unfiled Returns
☐ IRS Notice
☐ State / Local Tax Notice
☐ Bank Levy
☐ Wage Garnishment
☐ Federal / State Tax Lien
☐ Audit / Examination
☐ Appeal / CDP / Hearing
☐ Installment Agreement Review
☐ Partial-Pay Installment Agreement (PPIA)
☐ Offer in Compromise (OIC)
☐ Currently Not Collectible / Hardship
☐ Penalty Abatement
☐ Payroll / Employment Taxes
☐ Sales / Use / Excise Taxes
☐ Trust Fund / Responsible Person Issue
☐ Amended / Corrective Return Work
☐ Tax Preparation / Compliance
☐ Other / Not Sure

Agency / taxing authority involved:

☐ IRS / U.S. Treasury
☐ State Tax Authority
☐ Local Tax Authority
☐ More Than One Agency
☐ Not Sure

State(s) or local jurisdiction(s), if applicable:

______________________________________________

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Tax years / periods involved * Example: 2021-2024, 2019 & 2022, or 941 quarters.

______________________________________________

Approximate amount owed or disputed *

______________________________

Approximate penalties / interest, if known

______________________________

Earliest tax year involved

______________________________

Most recent tax year involved

______________________________

Are all required tax returns filed? *

☐ Yes ☐ No ☐ Not Sure

Missing or unfiled years / periods, if known:

______________________________________________

## 3. NOTICES, DEADLINES & COLLECTION ACTIVITY

Have you received a notice or letter? *

☐ Yes ☐ No ☐ Not Sure

Agency shown on notice

______________________________

Notice / letter number or type

______________________________

Notice date

______________________________

Response / appeal / hearing deadline

______________________________

Current or threatened collection / enforcement activity:

☐ None Known
☐ Collection Notices Only
☐ Bank Levy
☐ Wage Garnishment
☐ Tax Lien
☐ Revenue Officer / Collector Contact
☐ Audit / Examination
☐ Appeal / Hearing
☐ Court / Litigation Notice
☐ Threatened Seizure
☐ Not Sure

Name / phone / fax of IRS or state contact shown on notice, if known:

______________________________________________

What does the most urgent notice say, and what deadline are you concerned about?

## 4. FILING, PAYMENT & RESOLUTION HISTORY

Have you previously had any of the following?

☐ IRS / State Installment Agreement
☐ Offer in Compromise
☐ Currently Not Collectible / Hardship Status
☐ Penalty Abatement Request
☐ Appeal / CDP Hearing
☐ Prior Audit / Exam
☐ Bankruptcy Affecting Tax Debt
☐ Prior Tax Resolution Company / Representative
☐ None / Not Sure

Briefly describe any prior payment plan, settlement attempt, appeal, audit, or representation:

Current monthly tax payment, if any

______________________________

Amount currently being levied / garnished, if any

______________________________

Last payment made, approximate date

______________________________

Refunds being held or offset? ☐ Yes ☐ No ☐ Not Sure

______________________________

## 5. FINANCIAL SNAPSHOT - APPROXIMATE AMOUNTS ONLY

This is a preliminary snapshot only. Detailed financial records, account numbers, and supporting documents should be provided later through the secure client portal.

Household size
______________________________________________

Monthly gross household income
______________________________________________

Monthly take-home household income
______________________________________________

Monthly necessary living expenses
______________________________________________

Monthly housing payment
______________________________________________

Monthly vehicle / secured debt payments
______________________________________________

Approximate cash / bank balances
______________________________________________

Approximate retirement account value
______________________________________________

Approximate real estate equity
______________________________________________

Approximate vehicle / other major asset equity
______________________________________________

Has your income recently changed significantly?

☐ Yes - Increased
☐ Yes - Decreased
☐ No Significant Change
☐ Not Sure

Describe any hardship or major change affecting ability to pay Examples: job loss, reduced hours, illness, caregiving, divorce, business decline, retirement, disaster, or other major event.

## 6. GOALS & REQUESTED HELP

What would you most like help accomplishing?

☐ Stop or reduce immediate collection pressure
☐ Become filing compliant
☐ Understand what the IRS / state records show
☐ Correct an inaccurate balance or return
☐ Establish an affordable payment plan
☐ Evaluate hardship / Currently Not Collectible status
☐ Evaluate Offer in Compromise eligibility
☐ Seek penalty relief
☐ Address a lien or levy
☐ Prepare for audit / appeal / hearing
☐ Resolve business or payroll tax issues
☐ Create a complete Tax + Debt-to-Wealth strategy
☐ Not Sure - Need Investigation First

Brief overview of your situation * Include what happened, what you have already tried, and what you need help with first.

## 7. DOCUMENTS AVAILABLE

Which items do you currently have available?

☐ IRS Notices / Letters
☐ State Tax Notices
☐ Recent Filed Tax Returns
☐ Unfiled Return Documents
☐ IRS Transcripts / Account Records
☐ Pay Stubs / Income Records
☐ Bank Statements
☐ Business Financial Records
☐ Prior Payment Agreement / OIC Papers
☐ Prior Representative Correspondence
☐ Other

NEXT STEP: Do not email sensitive documents unless instructed. Upload confidential records through the secure client portal: mbafinancial.logicsportal.com.

## 8. INTAKE ACKNOWLEDGMENT

☐ I understand this intake is for preliminary review only. Submitting it does not create a client engagement, power of attorney, or representation relationship. Services begin only after MBA Financial accepts the matter and the required written engagement and authorization documents are completed.

☐ I understand tax resolution results depend on the actual account records, filing compliance, financial facts, documentation, deadlines, and agency rules. No settlement amount, payment amount, levy release, lien release, penalty reduction, or other outcome is guaranteed.

☐ I understand I should not ignore any IRS, state, court, audit, levy, garnishment, or appeal deadline while waiting for a response to this intake.

| Client / Prospective Client Name | Date Completed |
| --- | --- |
| ______________________________________________ | ______________________________________________ |

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# DEBT SOLUTIONS INTAKE FORM

TaxDebtWise by MBA Financial Tax & Accounting LLC

Complete what you know so we can better understand your debt, payment pressure, collection activity, cash flow, and financial goals. Debt-reduction planning is not a promise of a specific savings amount, payoff date, settlement, creditor decision, credit-score improvement, or financial result. The purpose is to review the facts and identify practical next steps.

URGENT DEADLINE: If you received lawsuit papers, a summons or complaint, garnishment paperwork, levy notice, lien notice, repossession or foreclosure notice, or any court response deadline, call (989) 686-6633 immediately before relying on this form.

SECURITY: Do not enter Social Security numbers, bank-account numbers, full card numbers, passwords, or confidential financial records on an unsecured copy. Use the secure client portal for confidential documents.

## 1. CONTACT & HOUSEHOLD / BUSINESS INFORMATION

First Name * ______________________

Last Name * ______________________

Email Address * ______________________

Best Phone Number * ______________________

Street / Mailing Address ______________________

City, State & ZIP ______________________

Best Time to Contact ______________________

Preferred Contact: ☐ Call ☐ Text ☐ Email ______________________

You are contacting us as: *

☐ Individual ☐ Business ☐ Both Individual & Business

Business / Entity Name, if applicable: ______________________

Household size ______________________

Number of income earners ______________________

Monthly gross household income ______________________

Monthly take-home household income ______________________

## 2. DEBT OVERVIEW

Debt type(s): *

☐ Credit Cards ☐ Personal Loans ☐ Medical Bills
☐ Collections ☐ Vehicle Loans ☐ Mortgage / Home Equity
☐ Tax Debt ☐ Business Debt ☐ Student Loans
☐ Judgments ☐ Other

Approximate total debt * ______________________

Approximate monthly debt payments * ______________________

Approximate secured debt ______________________

Approximate unsecured debt ______________________

Overall account status: *

☐ Current ☐ Behind on Payments
☐ In Collections ☐ Charged Off
☐ In Court ☐ Mixed Status
☐ Not Sure

Are any debts related to taxes?

☐ Yes – IRS ☐ No ☐ Yes - State / Local ☐ Not Sure

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## 3. CREDITOR / ACCOUNT SUMMARY

List the largest or most urgent debts first. Do not include complete account numbers; use only the creditor name and last four digits if needed.

| Creditor / Collector | Debt Type | Approx. Balance | Monthly Payment | Status / Days Behind | Deadline / Notes |
|---|---|---|---|---|---|
| | | | | | |
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## 4. COLLECTION, LAWSUIT & URGENCY REVIEW

Have you received any of the following? *

☐ Collection Letters
☐ Demand Letter
☐ Summons / Complaint / Lawsuit Papers
☐ Judgment Notice
☐ Wage Garnishment Notice
☐ Bank Levy / Restraint Notice
☐ Lien Notice
☐ Repossession Notice
☐ Foreclosure / Default Notice
☐ Tax Collection Notice
☐ None / Not Sure

Is there a court date, answer deadline, hearing, sale date, or urgent response date? *

☐ No ☐ Yes ☐ Not Sure

Urgent date / deadline
______________________________________________

Court / agency / creditor involved
______________________________________________

Describe the most urgent collection or court activity Include the notice date, deadline, and what the creditor or collector is demanding.

## 5. MONTHLY CASH-FLOW SNAPSHOT - APPROXIMATE AMOUNTS

Housing - rent / mortgage
______________________________________________

Utilities
______________________________________________

Food / household supplies
______________________________________________

Vehicle payments
______________________________________________

Fuel / transportation
______________________________________________

Insurance
______________________________________________

Medical / prescriptions
______________________________________________

Child / dependent care
______________________________________________

Taxes / tax payment plans
______________________________________________

Other necessary monthly expenses
______________________________________________

Approximate monthly amount left after necessities
______________________________________________

Approximate amount available for debt payments
______________________________________________

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Are you currently using credit or loans to cover basic living expenses?

☐ Yes ☐ No
☐ Sometimes ☐ Not Sure

Has household or business income changed recently?

☐ Income Increased ☐ Income Decreased
☐ No Significant Change ☐ Not Sure

Describe any financial hardship or recent change Examples: reduced hours, job loss, medical expense, divorce, caregiving, business decline, retirement, or other event.

## 6. ASSETS & SECURED OBLIGATIONS - HIGH-LEVEL ONLY

Do not provide account numbers. Approximate values are enough for initial strategy review.

Approximate cash / savings
____________________________________________

Approximate retirement assets
____________________________________________

Approximate home / real estate equity
____________________________________________

Approximate vehicle equity
____________________________________________

Other major assets
____________________________________________

Business assets, if applicable
____________________________________________

Are any major assets currently at risk?

☐ No ☐ Vehicle Repossession Risk
☐ Foreclosure Risk ☐ Lien / Judgment Risk
☐ Tax Levy / Seizure Risk ☐ Not Sure

## 7. PRIOR DEBT EFFORTS

Have you already tried any of the following?

☐ Budgeting / Snowball / Avalanche Plan ☐ Creditor Hardship Program
☐ Direct Settlement Negotiation ☐ Debt Management Plan
☐ Debt Settlement Company ☐ Consolidation Loan
☐ Refinance / Home Equity ☐ Bankruptcy Consultation
☐ Tax Resolution Program ☐ None / Not Sure

What worked, what did not, and what are you currently paying under any plan?

## 8. GOALS & REQUESTED HELP

What do you want help with? *

☐ Budgeting ☐ Debt Prioritization
☐ Repayment Strategy ☐ Debt Settlement Options
☐ Tax Debt ☐ Cash-Flow Restructuring
☐ Plan for Collections / Charged-Off Accounts ☐ Prepare for Creditor Negotiation
☐ Coordinate Tax Debt with Other Debts ☐ Long-Term Debt-to-Wealth Strategy
☐ All of the Above ☐ Other / Not Sure

What would make the biggest difference over the next 30-90 days?

Briefly describe your situation and financial goals * Include as much information as you can. This helps us review your situation before contacting you.

## 9. DOCUMENTS AVAILABLE

Which documents do you currently have?

☐ Recent Creditor Statements
☐ Collection Letters
☐ Court / Lawsuit Papers
☐ Garnishment / Levy Papers
☐ Mortgage / Vehicle Statements
☐ Recent Pay Stubs
☐ Bank Statements
☐ Household Budget
☐ Business Financial Statements
☐ Tax Notices / Tax Records
☐ Other

NEXT STEP: Use the secure client portal for confidential documents: mbafinancial.logicsportal.com. If a legal or court deadline is approaching, do not wait for routine intake processing before seeking timely assistance.

## 10. INTAKE ACKNOWLEDGMENT

☐ I understand this intake is for preliminary financial and debt-strategy review only. Submitting it does not create a client engagement or guarantee that MBA Financial will accept the matter.

☐ I understand that creditor decisions, settlement amounts, payment terms, collection actions, court outcomes, interest, fees, credit reporting, and tax results are controlled by third parties and applicable law; no specific outcome is guaranteed.

☐ I understand MBA Financial Tax & Accounting LLC is not a substitute for legal counsel on contested lawsuits, court representation, bankruptcy, or other legal matters requiring an attorney, and I should not ignore a summons, court date, garnishment deadline, foreclosure deadline, or other legal notice.

Client / Prospective Client Name
______________________________________________

Date Completed
______________________________________________