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

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

____

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 ______________________

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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
____	____