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What You Need to Gather
When the IRS Claims You Owe a Debt



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What You Need to Gather When the IRS Claims You Owe a Debt

- ☐ IRS Form 433-A
- ☐ IRS Form 433-B
- ☐ Personal bank statements (3-6 most current months)
- ☐ Business bank statements if applicable (3-6 most current months)
- ☐ Profit and loss statement for your business if applicable (last 6 months)
- ☐ Most recent paystub
- ☐ Any unemployment, social security, or other public assistance checks
- ☐ Retirement Accounts
- ☐ Brokerage Accounts
- ☐ Stocks
- ☐ Whole Life Insurance policy
- ☐ Mortgage statement
- ☐ Auto loan statement
- ☐ Substantiation of monthly living expenses (utilities, child care, child support, taxes, etc.)
- ☐ Copy of divorce decree showing court order of child support if applicable
- ☐ Proof of quarterly deposits for self-employed individuals making estimated tax payments



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