

Taxpayer Financial Statement for Installment Agreement

Please complete all sections below to assess your financial situation for an installment agreement. This form is designed for printing.

Section 1: Personal Information

Full Name:

Social Security Number (SSN) or ITIN:

Date of Birth (MM/DD/YYYY):

Street Address:

City:

State:

ZIP Code:

Home Phone:

Work Phone:

Section 2: Employment Information

Current Employer Name:

Employer Address:

Job Title / Occupation:

How Often Paid (e.g., Weekly, Bi-weekly, Monthly):

Section 3: Banking and Asset Information

Primary Bank Account

Bank Name:

Account Type (Checking/Savings):

Current Balance:

Secondary Bank Account

Bank Name:

Account Type (Checking/Savings):

Current Balance:

Real Estate / Property owned

Property Address:

Estimated Current Value:

Section 4: Monthly Income (Gross and Net)

Gross Monthly Wages/Salary:

Net Monthly Wages (Take-home pay):

Pension / Retirement Income:

Social Security Income:

Other Monthly Income (specify source):

Total Net Monthly Income:

Section 5: Monthly Living Expenses

Rent or Mortgage Payment:

Utilities (Electric, Gas, Water, Trash):

Food and Groceries:

Transportation (Car payments, Fuel, Public transit):

Insurance (Health, Life, Home, Auto):

Out-of-pocket Medical Expenses:

Estimated Taxes (if not withheld):

Other Necessary Expenses (specify):

Total Monthly Expenses:

Section 6: Proposed Installment Agreement

Proposed Monthly Payment Amount:

Proposed Day of the Month for Payment:

Section 7: Certification and Signature

Under penalties of perjury, I declare that I have examined this financial statement, and to the best of my knowledge and belief, it is true, correct, and complete.

Taxpayer Signature (Print and Sign):

Date (MM/DD/YYYY):