Form **12508**
(Rev. July 2013)

Questionnaire for Non-Requesting Spouse

We recognize that some of these questions involve sensitive subjects. However, we need this information to evaluate the circumstances of the claim and properly determine whether relief should be given. If this form is not completed and returned, the claim will be considered based on the information available to us.

Questions?
Call the IRS at 1-855-851-2009.

Part I Tell us about yourself

1.

Your Current Name	Your Social Security Number	
Your Current Home Address *(number & street)*	Apt. No.	County
City, town or post office box, state and ZIP code	Daytime phone number *(between 6 a.m. and 5 p.m. Eastern Time)* ( )	

2. What is the current status between you and your spouse for the years that relief was requested? (On this form we refer to your spouse for the years that relief was requested as *that individual.)*

☐ Married and living together

☐ Married living apart since ____________ MM / DD / YYYY

☐ Legally separated since ____________ MM / DD / YYYY

☐ Divorced since ____________ MM / DD / YYYY

☐ Widowed since ____________ MM / DD / YYYY

Note: A divorce decree stating you must pay all taxes does not necessarily mean that individual will qualify for relief.

Part II Tell us about filing the returns and your financial situation for the years listed on the letter. If the information is not the same for all tax years, please explain. If you need more room to write your answer for any question, attach more pages. Be sure to write your name and social security number on the top of all pages you attach.

3. How were both of you involved with preparing the returns during those tax years? Check all that apply and explain, if necessary. If the answers are not the same for all the years, explain.

You	That Individual	
☐	☐	Prepared or helped prepare the returns.
☐	☐	Gathered receipts and canceled checks.
☐	☐	Gave tax documents (such as W-2s, 1099s, etc.) to the person who prepared the returns.
☐	☐	Asked the person who prepared the returns to explain any items or amounts.
☐	☐	Reviewed the returns before filing them.
☐	☐	Did not review the returns before filing them.
☐	☐	Was not involved with preparing the return.
☐	☐	Other

Explain, if necessary

____

____

____

____

4. When you filed the returns, were any amounts owed to the IRS for those years?
   - ☐ Yes. Explain how the amounts owed were to be paid.
   - ☐ No

5. When that individual signed/filed any of the returns, was he/she aware of any financial problems you were having (for example, bankruptcy or bills you could not pay)?
   - ☐ Yes. Explain
   - ☐ No
   - ☐ Do not know

6. For those years, what kinds of accounts did you have? Check all that apply. Explain if the answers are not the same for all the years.

Joint	Separate	
☐	☐	Checking or money market
☐	☐	Savings or certificate of deposit

How did that individual use those accounts? Check all that apply.

Joint	Separate	
☐	☐	Made deposits
☐	☐	Reviewed bank statements or balanced the checkbook
☐	☐	Paid bills
☐	☐	Knew how much money was in the account
☐	☐	Made withdrawals from the account
☐	☐	Did not know about the account
☐	☐	Did not use the account
☐	☐	Was not involved in handling money for the household

Explain, if necessary

7. Did you ever transfer assets to that individual? (Did you put something of value, such as real estate or stocks, in that individual's name rather than in your own name?)
   - ☐ Yes. List the assets and the dates they were transferred. Explain why the assets were transferred.
   - ☐ No

8. During those tax years, were you self employed?
   - ☐ Yes. Explain how that individual was involved in your business.
   - ☐ No

9. If the tax year(s) in question were audited, what items, if any, changed? Were the changed items yours or that individual's? (For example, unreported income, disallowed deductions, unclaimed credits)

10. If the audit results changed your business income or deductions on your tax return, did that individual help you in the business? If so how? If not, did that individual know about your business affairs? Explain.

11. If the items changed by the audit were yours, did that individual benefit from them? (Example, unreported income paid for a family vacation, car, jewelry, etc.) Explain.

12. Do you have any other information you want us to consider?

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

Signature

Date

Keep a copy for your records. Return the original signed form and any attachments in the enclosed envelope or you may fax the signed form and attachments to 1-855-233-8558.