

100% Internet Based  
95% Out of state Clients



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## IRS Wage Levy Package

By Jeff Parrack  
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## I. IRS Wage Levy Introduction

Here is the IRS Wage Levy Release information you requested.  
Please read it carefully.

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**Take Advantage of The National Internet CPA's 100% Guarantee:**

**Your IRS Wage Levy Will Be Released or You won't Pay Me a Dime!**

Hi. My name is Jeff Parrack, and I'm The National Internet CPA because I am 100% Internet-based and over 95% of my clients find me through Internet searches. I spend my entire workweek negotiating IRS Wage Levy Releases for people just like you all over the country. My entire business concentrates on providing my clients with IRS Wage Levy Releases in less than five days. I'll keep IRS out of your paycheck by quickly and effectively negotiating an IRS Wage Levy Release for you. I work directly with the IRS every business day getting IRS Wage Levy Releases for people from coast to coast who call me for one reason only – get that nasty IRS Wage Levy released!

When you work with me, you'll get your IRS Wage Levy Release in a matter of 2 to 5 days (sometimes less) and keep IRS out of your paycheck.

All of my clients are just regular working people who have been blindsided by an IRS Wage Levy. They find out that as much as 80% of their next paycheck and every paycheck after that will be going to IRS. They panic. They hyperventilate.

Then they get on the Internet and look for help. Or maybe they read one of my ads in large city newspapers across the country. Either way, **they** find **me**. Absolutely 100% of my IRS Wage Levy Release clients seek me out.

If you recently received the bad news from your employer or if you just received an IRS Notice of Intent to Levy, you don't have time to waste, do you?

If you call IRS yourself and talk to them on the phone, are you going to believe everything you're told by the people whose job is to collect as much money from you fast as possible? Will you be experienced enough to tell the truth from the bluff?

Are you willing to bet 80% of your next paycheck that you can convince IRS to "let you have their money"? After all, they consider it their money – I've heard them say it.

**Under no circumstances will IRS representatives ever be allowed to contact you regarding your IRS Wage Levy once I am your Power of Attorney and representing you. After all, that's my job and I'm very good at it. And it's what you pay me to do.**

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**This Fax Packet contains:**

1. These Cover Sheets and their critical information
2. Information on how you can contact me
3. An IRS Wage Levy Release Fee Schedule – how many of my competitors will show you all their fees and quote you a final price and stick to it with no later changes?
4. An IRS Wage Levy Release Payment Requirements statement
5. Forms and instructions on information you must provide me if you decide to use my services:
  - Personal Information Data Sheet
  - Monthly Expense Report Data Sheet
  - Power of Attorney
  - Additional information now required by IRS to release levies
  - A Checklist of all the information you must provide me so I that I can prepare for my coming IRS negotiations

The purpose of this IRS Wage Levy Release Information Fax Packet is to provide you with the initial information I give to all of my prospective clients, but to do so in a manner that will save us both some valuable time that can be put to better use – securing your IRS Wage Levy Release from IRS in as little as 3 to 5 days ..... or less in some cases.

If you want to call me to discuss your IRS Wage Levy problem, please complete the two Data Sheets and fax them to me so that I can refer to them when you call.

You need an IRS Wage Levy Release *right now* or you'll lose a lot of money, right?

IRS Wage Levy Release service is a specialized field and you want someone to help you who knows this subject not just well, but *extremely well*, right?

Negotiating IRS Wage Levy Releases is all I do. Nothing else. I have slashed and burned everything else I do so that I now spend my time only on providing troubled taxpayers nationwide with my totally guaranteed IRS Wage Levy Release service. My competitors include IRS Wage Levy Release services as one of the many hats they wear. But the **only** hat that fits me is the one labeled IRS Wage Levy Release. I've been doing this for so long that I can get yours done in a matter of days - sometimes hours.

For some strange reason I just love beating IRS at their own game. And over the last several years I haven't seen an IRS Wage Levy Release that I couldn't get from them, either. When you and I play *their* game on *their* turf by *their* rules, we will still win every time. But like the game rules say: don't play this game alone because you need professional help.

I'll spend some time with you on the phone discussing your IRS Wage Levy, but I prefer to spend the rest of my time effectively working for my clients since they are depending on me to provide their IRS Wage Levy Releases as quickly as possible. You'll appreciate my "all business" approach when you give me the green light to get your IRS Wage Levy Release. After you read this website, you can contact me and we will spend some time on the phone discussing your IRS Wage Levy Release immediately!

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## II. Contact Information

**Your IRS Wage Levy Release is my goal. I usually get it done in 3-5 days. You'll be thrilled when I call you and tell you I have your IRS Wage Levy Release in my hand!**

After our first or second telephone conversation(s), I prefer that you contact me by fax. It cuts down on my phone time and helps me dedicate more precious time to getting your IRS Wage Levy Release as fast as possible.

Note that I usually will not answer my phone before 10:00 a.m. since I'm usually on the phone with IRS until then. I call IRS promptly at 8:00 every morning so I can be first in line to talk to them when they turn on their phones. I prefer to focus on the mind game of showing IRS that they must immediately issue your IRS Wage Levy Release so that you will lose none of your next paycheck. You may not like my short phone conversations at first, but you'll appreciate them when I fax your IRS Wage Levy Release to your employer so that you'll get your full paycheck on your next payday.

You may find it difficult to reach me on the telephone. That's because I spend my day negotiating for your (and others') IRS Wage Levy Release.

After 25 years in this business, I have found that telephone conversations will consume more productive time than anything else during the day. I have also discovered that limiting my telephone time (talking to IRS is the only exception) can almost double my productivity during an average week. This can make the difference between getting your own IRS Wage Levy Release before your next payday rather than after it.

My preferred method of contact and communication is the fax machine. It gets your information to me faster than any other method and leaves no room for misunderstandings since it leaves a paper trail. This may annoy you or be inconvenient, but it allows me to devote more time to getting your IRS Wage Levy Release.

**Fax**  
**(817) 263-0770**

**Toll Free Phone**  
**(877) 256-3328**

**email**  
**cpa@taxnegotiations.com**

**This is my preferred method of contact after our initial telephone conversation, so please use it to give me more productive time.**

After our initial telephone contact and discussions, please use this phone number sparingly as it interrupts valuable "hard work" time.

I prefer not to use email as it is less effective and less efficient than the fax machine. I prefer to have copies of all my contacts with you.

I'm all business when it comes to getting your IRS Wage Levy Release. I find the Fax is mightier than the phone and saves a lot of valuable time.

Once I have your required information, the less time I'm on the phone (except with IRS), the faster I'll get your IRS Wage Levy Release.

Email takes too much precious time to clean up and cull through - just like junk mail. It's not good for guaranteeing your IRS Wage Levy Release.

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### III. Services and Fees

<b>Level 1</b> \$695	Only one of the following: <ul style="list-style-type: none"><li>➤ IRS Wage Levy Release</li><li>➤ Monthly Installment Agreement at lowest possible amount</li><li>➤ Currently Non Collectible status negotiation</li></ul> Total Regular fee is \$850 – a savings of \$155
<b>Level 2</b> \$895	Any combination of Level 1 Services Total regular fee as high as \$1,465 – a savings of up to \$570
<b>Tax Return Preparation for Unfiled Years</b>  \$197 each up to a maximum of \$895 for as many as are required	Some people have not filed federal income tax returns for one or more years. Before IRS will release a levy, the taxpayer must have filed at least his/her last 6 tax returns. I will: <ul style="list-style-type: none"><li>➤ Coordinate with my IRS reps and have them fax directly to me your income and other documents. This way you will not have to dig into old boxes and files trying to find W-2s and 1099s and risk missing some of them.</li><li>➤ I will prepare your tax returns in a matter of hours – FAST</li><li>➤ I will then fax the returns to you for your review and signature(s)</li><li>➤ You will fax back to me only the signature pages</li><li>➤ IRS will accept from me (again in a special procedure reserved for a small group of professionals) the faxed tax returns with your faxed signature(s)</li><li>➤ Your tax returns will then be immediately processed into the IRS Computer System rather than taking six to eight weeks or longer (as is normal when the returns are mailed to IRS) to post into their computer system</li><li>➤ This special procedure saves both of us lots of time and saves <u>you</u> hundreds and possibly thousands of dollars by allowing me to release your levy in a matter of <u>days!</u></li></ul>
<b>Tax Return Preparation to replace returns IRS filed for you called Substitute For Returns (SFRs)</b>  \$197 each up to a maximum of \$895 for as many as are needed	IRS will often “do you a favor” and file tax returns for you if you don’t file them for yourself. Called Substitute For Returns (SFRs), they must be filed within the standard three-year statutory period in order to be accepted as properly filed. These returns will always be filed as Single or Married Filing Separate and will result in the highest possible tax calculation since they allow for no additional dependents or any itemized or business deductions or other benefits to the taxpayer. IRS will always allow a taxpayer to replace an SFR with his/her own actual tax return. My policy is to always prepare my own tax returns and compare them to the SFRs; if my tax returns are better (and about 75% of the time they are), then my returns will be filed to replace the SFRs. In many cases, my tax returns will save my clients thousands or even tens of thousands of dollars. If my tax returns don’t benefit my client, then there will be no charge for my work.
<b>Penalty &amp; Interest Calculations</b> \$145 Total cost	IRS charges penalties and interest on all overdue accounts. P&I can actually double your amount due. I’ll independently calculate your P&I for one small fee no matter how many years are involved. My clients really appreciate this service for the peace of mind (and verification) it provides. I’ll even provide you with copies of all the calculations so you can see how expensive IRS makes it on you.
<b>Cases where IRS debt is over \$100,000</b> \$395 surcharge	If your total amount due IRS is over \$100,000, your case requires special handling, reporting and documentation requirements. It will take additional time since the IRS High Dollar Unit in Buffalo, NY is tremendously backlogged and slow. I must follow special procedures to deal with your High Dollar case and this requires additional time and attention.
<b>Special IRS cases managed by a local IRS Revenue Officer</b> \$395 surcharge	If your IRS Collection case has been transferred to an IRS office near you, then only the Revenue Officer (RO) who has been assigned the case can discuss it. This adds limitations and additional time and documentation requirements. Many IRS Field ROs are extremely demanding and are difficult to work with, but I’ll still get the job done.

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## IV. Payment Requirements

### Here Are My Payment Requirements For Your Own Personal IRS Wage Levy Release

50% refundable deposit when you fax your Power of Attorney to me

50% when I have your Release ready to fax to your employer – usually in 2 to 5 days

My payment plan is sweet and simple. I keep my end of the bargain by getting you an IRS Wage Levy Release and you pay me for it. It's that sweet and that simple.

Although this payment requirement is tough and may cause some initial discomfort, it is only temporary. An IRS Wage Levy is tougher and will cause a ***lot*** of long-term excruciating pain and agony.

Take your choice.

Those who ask me to provide them with an IRS Wage Levy Release clearly understand this policy and must agree to it before I will help them.

If you are unwilling to agree to the above payment terms and pay the refundable 50% deposit, please don't call me. I expect you to provide payment information when you ask me to work for you. I cannot be a bank and loan you my fee - I'm not in that line of business. If you do not have the money to pay my fee, you must borrow the money from another source - business, family, or friend. Promises of future payments will not be accepted, either. I've been burned too many times and will not provide my work in this fashion any longer. I am dedicated to only the serious IRS Wage Levy Release clients. IRS will take a lot more than my fee from you, so if you will not place a priority on your trouble by paying a deposit and agreeing to the payment terms that are clearly defined in this information sheet, you will be politely told that my serious clients come first and there are no seconds.

Please understand that I am not trying to be rude or impolite. I am just stating the facts and emphasizing my seriousness about my dedication to releasing those harmful IRS Wage Levies.

**WARNING: Those who benefit from my hard work and specialized knowledge and then prove untrustworthy by failing to pay me will suffer from another IRS Wage Levy. My policy for non-payers is to immediately contact IRS and inform them to reverse all the work I have done and to remove me as Power of Attorney. They will do this and then immediately issue another Wage Levy that will prove virtually impossible to release.**

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## V. Instructions for Client Information Sheets

The following Power of Attorney (POA) and the three Client Information Sheets as well should be completed in detail. All of the Sheets and the information they contain are **absolutely critical** for me to properly negotiate your IRS Wage Levy Release.

Please complete the Sheets by printing legibly. If any requested information does not apply, please print "N/A" in the blank. If you are married and living with your spouse, you **must** include your spouse's income information – even if the wage levy is only for your individual taxes.

Also complete POA Section 1 with your name(s), address, and Social Security Number(s).

Sign and date POA Section 9.

Then make a copy of each Sheet and the POA, leaving the originals in your *IRS Wage Levy Release Information Fax Packet* so that you will have a complete Packet.

Fax the following information to me at (817) 263-0770:

1. Your legible and completed and signed and dated Power of Attorney
2. Your legible and completed Personal Information Sheet
3. Your legible and completed Monthly Expense Information Sheet
4. Your legible and completed Payment Information Sheet
5. A copy of your Wage Levy if you have it. You can get a copy from your Payroll Department.
6. A copy of your most recent pay stub(s) with year-to-date totals
7. And other information as requested

*Please complete all the sheets by printing legibly.*

After you fax the above information to me, you should allow one hour for me to review your information.

After an hour, please call me for a Free Consultation. We will discuss your specific personal and financial information and how it will affect your IRS Wage Levy Release negotiation.

Please be sure that you have carefully read the information prior to this section. You must be familiar with the information contained in the prior section or you will not sufficiently benefit from our discussion and may add unnecessary and costly time to your IRS Wage Levy Release negotiation.

### Special Bonus

Call me between 10:00AM and 5:00PM Central Time at 877-256-3328. That's what most people do anyway. If you have taken the time to print this information and read it then you deserve to talk to me. So call me between 10:00 AM and 5:00 PM when you've completed this information and we'll discuss your wage levy. After all, it's what you need and what I do best!

Pay close attention to the **XI** IRS Wage Levy Release Checklists information that absolutely **must** be faxed to me. The first section of the Checklist should be faxed to me ASAP so that I can familiarize myself with your case.

The information contained in the second part of the checklist will be required by IRS under all circumstances before any kind of negotiation will succeed.

The information requested in the second section of the Checklist should also be sent ASAP, but you can wait a few hours or even a few days before sending it all.

Obviously, the quicker you send all the required information, the quicker I can get your levy released.

IRS is good at stalling the negotiating process in order to get more of your money through their levies, but the IRS reps I deal with are specially trained to talk only to professionals who also have vast experience in these IRS Collection matters.

## Power of Attorney and Declaration of Representative

OMB No. 1545-0150  
**For IRS Use Only**

▶ **Type or print.** ▶ See the separate instructions.

Received by:  
 Name \_\_\_\_\_  
 Telephone \_\_\_\_\_  
 Function \_\_\_\_\_  
 Date     /     /

**Part I** **Power of Attorney**

**Caution:** Form 2848 will not be honored for any purpose other than representation before the IRS.

**1 Taxpayer information.** Taxpayer(s) must sign and date this form on page 2, line 9.

Taxpayer name(s) and address	<b>Social security number(s)</b> _____ _____ _____	<b>Employer identification number</b> _____ _____
	Daytime telephone number (     )     -     -     -     -     -     -     -     -     -	Plan number (if applicable)

hereby appoint(s) the following representative(s) as attorney(s)-in-fact:

**2 Representative(s)** must sign and date this form on page 2, Part II.

Name and address	CAF No. _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>
Name and address	CAF No. _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>
Name and address	CAF No. _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>

to represent the taxpayer(s) before the Internal Revenue Service for the following tax matters:

**3 Tax matters**

Type of Tax (Income, Employment, Excise, etc.) or Civil Penalty (see the instructions for line 3)	Tax Form Number (1040, 941, 720, etc.)	Year(s) or Period(s) (see the instructions for line 3)

**4 Specific use not recorded on Centralized Authorization File (CAF).** If the power of attorney is for a specific use not recorded on CAF, check this box. See the instructions for **Line 4. Specific uses not recorded on CAF.** . . . . . ▶

**5 Acts authorized.** The representatives are authorized to receive and inspect confidential tax information and to perform any and all acts that I (we) can perform with respect to the tax matters described on line 3, for example, the authority to sign any agreements, consents, or other documents. The authority does not include the power to receive refund checks (see line 6 below), the power to substitute another representative, the power to sign certain returns, or the power to execute a request for disclosure of tax returns or return information to a third party. See the line 5 instructions for more information.

**Exceptions.** An unenrolled return preparer cannot sign any document for a taxpayer and may only represent taxpayers in limited situations. See **Unenrolled Return Preparer** on page 2 of the instructions. An enrolled actuary may only represent taxpayers to the extent provided in section 10.3(d) of Circular 230. See the line 5 instructions for restrictions on tax matters partners.

List any specific additions or deletions to the acts otherwise authorized in this power of attorney: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**6 Receipt of refund checks.** If you want to authorize a representative named on line 2 to receive, **BUT NOT TO ENDORSE OR CASH**, refund checks, initial here \_\_\_\_\_ and list the name of that representative below.

Name of representative to receive refund check(s) ▶ \_\_\_\_\_

- 7 Notices and communications.** Original notices and other written communications will be sent to you and a copy to the first representative listed on line 2.
- a** If you also want the second representative listed to receive a copy of notices and communications, check this box
- b** If you do not want any notices or communications sent to your representative(s), check this box

**8 Retention/revocation of prior power(s) of attorney.** The filing of this power of attorney automatically revokes all earlier power(s) of attorney on file with the Internal Revenue Service for the same tax matters and years or periods covered by this document. If you **do not** want to revoke a prior power of attorney, check here.

**YOU MUST ATTACH A COPY OF ANY POWER OF ATTORNEY YOU WANT TO REMAIN IN EFFECT.**

**9 Signature of taxpayer(s).** If a tax matter concerns a joint return, **both** husband and wife must sign if joint representation is requested, otherwise, see the instructions. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, or trustee on behalf of the taxpayer, I certify that I have the authority to execute this form on behalf of the taxpayer.

**▶ IF NOT SIGNED AND DATED, THIS POWER OF ATTORNEY WILL BE RETURNED.**

Signature	Date	Title (if applicable)
Print Name	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> PIN Number	Print name of taxpayer from line 1 if other than individual
Signature	Date	Title (if applicable)
Print Name	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> PIN Number	

**Part II Declaration of Representative**

**Caution:** *Students with a special order to represent taxpayers in Qualified Low Income Taxpayer Clinics or the Student Tax Clinic Program, see the instructions for Part II.*

Under penalties of perjury, I declare that:

- I am not currently under suspension or disbarment from practice before the Internal Revenue Service;
- I am aware of regulations contained in Treasury Department Circular No. 230 (31 CFR, Part 10), as amended, concerning the practice of attorneys, certified public accountants, enrolled agents, enrolled actuaries, and others;
- I am authorized to represent the taxpayer(s) identified in Part I for the tax matter(s) specified there; and
- I am one of the following:
  - a** Attorney—a member in good standing of the bar of the highest court of the jurisdiction shown below.
  - b** Certified Public Accountant—duly qualified to practice as a certified public accountant in the jurisdiction shown below.
  - c** Enrolled Agent—enrolled as an agent under the requirements of Treasury Department Circular No. 230.
  - d** Officer—a bona fide officer of the taxpayer’s organization.
  - e** Full-Time Employee—a full-time employee of the taxpayer.
  - f** Family Member—a member of the taxpayer’s immediate family (i.e., spouse, parent, child, brother, or sister).
  - g** Enrolled Actuary—enrolled as an actuary by the Joint Board for the Enrollment of Actuaries under 29 U.S.C. 1242 (the authority to practice before the Service is limited by section 10.3(d) of Treasury Department Circular No. 230).
  - h** Unenrolled Return Preparer—the authority to practice before the Internal Revenue Service is limited by Treasury Department Circular No. 230, section 10.7(c)(1)(viii). You must have prepared the return in question and the return must be under examination by the IRS. See **Unenrolled Return Preparer** on page 2 of the instructions.

**▶ IF THIS DECLARATION OF REPRESENTATIVE IS NOT SIGNED AND DATED, THE POWER OF ATTORNEY WILL BE RETURNED.** See the Part II instructions.

Designation—Insert above letter (a–h)	Jurisdiction (state) or identification	Signature	Date

## VII. Client Information Sheet: Personal Information

	<b>Last Name</b>	<b>First Name</b>	<b>Social Security Number</b>	<b>Date of Birth</b>
<b>You</b>	_____	_____	____ - ____ - _____	____ / ____ / ____
<b>Spouse</b>	_____	_____	____ - ____ - _____	____ / ____ / ____

	<b>Address</b>	<b>Phone Numbers</b>
	_____	<b>Home</b> _____ / ____ - _____
	_____	<b>Your Cell</b> _____ / ____ - _____
	_____	<b>Your Work</b> _____ / ____ - _____
	_____	<b>Sp Cell</b> _____ / ____ - _____
<b>County</b>	_____	<b>Sp Work</b> _____ / ____ - _____
		<b>Your Fax</b> _____ / ____ - _____
<b>Your email</b>	_____	<b>Sp Fax</b> _____ / ____ - _____
<b>Spouse's email</b>	_____	

	<b>Additional Dependents in Your Home</b>	<b>Social Security Number</b>	<b>Date of Birth</b>
	_____	____ - ____ - _____	____ / ____ / ____
	_____	____ - ____ - _____	____ / ____ / ____
	_____	____ - ____ - _____	____ / ____ / ____
	_____	____ - ____ - _____	____ / ____ / ____
	_____	____ - ____ - _____	____ / ____ / ____

	<b>Your Employer &amp; Address - if over 1 use additional sheet.</b>	<b>Payroll Contact</b>
<b>Name</b>	_____	<b>Name</b> _____
<b>Address</b>	_____	<b>Address</b> _____
	_____	_____
<b>Phone</b>	_____ / ____ - _____	<b>Phone</b> _____ / ____ - _____
<b>Fax</b>	_____ / ____ - _____	<b>Fax</b> _____ / ____ - _____

	<b>Spouse's Employer &amp; Address - if over 1 use additional sheet.</b>	<b>Payroll Contact</b>
<b>Name</b>	_____	<b>Name</b> _____
<b>Address</b>	_____	<b>Address</b> _____
	_____	_____
<b>Phone</b>	_____ / ____ - _____	<b>Phone</b> _____ / ____ - _____
<b>Fax</b>	_____ / ____ - _____	<b>Fax</b> _____ / ____ - _____

What Search Engine did you use to find me? Google Yahoo MSN Other: \_\_\_\_\_

What search term or phrase did you use? \_\_\_\_\_

What website(s) did you visit? taxnegotiations.com wagelevy.com irswagegarnishmenthelp.com  
 wagelevyrelease.com wagelevyrelease.com wagegarnishment.com Other: \_\_\_\_\_

Which of my competitors did you visit? \_\_\_\_\_

Why did you choose me? \_\_\_\_\_

I always must know how much you estimate you can pay IRS on a monthly basis if this must be done. So this is how I ask the question - with a little humor but in absolute and total seriousness: With your back(s) to the wall and a gun to your head(s) and IRS' itchy finger on the trigger(s), give me the absolute TOP monthly amount you can pay AND NEVER MISS A MONTHLY PAYMENT. I will use this amount as a ceiling through which I will not go without your approval if I must agree to a monthly Installment Agreement with IRS. Please understand I want the highest you CAN pay, not the highest you WANT to pay. Also note that I rarely reach your TOP figure. If preferred, I can set your payment up as a Payroll Deduction.

\$ \_\_\_\_\_

\_\_\_\_\_ / \_\_\_\_ / \_\_\_\_

\_\_\_\_\_  
**Signature verifying accuracy of above information** \_\_\_\_\_  
**Date**

# VIII. Client Information Sheet: Monthly Expense Information

## Monthly Income & Expense Worksheet for \_\_\_\_\_

Print legibly w/dark pencil so you can make corrections

Last Name \_\_\_\_\_

First Name \_\_\_\_\_

**Do not write above the thick black line below**

Social Security \_\_\_\_\_

Income		Expenses		IRS	FINAL
Wages - TP	\$ _____	1. Nat'l Std ( )	\$ _____	\$ _____	\$ _____
Wages - Sp	_____	2. Housing ( )	_____	_____	_____
Business	_____	3. Auto Operating	_____	_____	_____
SS - TP	_____	4. Auto Note Pmts	_____	_____	_____
SS - Sp	_____	5. Health Care	_____	_____	_____
Child Support	_____	6. Child Care	_____	_____	_____
Alimony	_____	7. Term Life Ins	_____	_____	_____
_____	_____	8. Court Ordered	_____	_____	_____
_____	_____	9. Other	_____	_____	_____
_____	_____	10. Credit Cards	_____	_____	_____
<b>Total Income</b>	<b>\$ _____</b>	<b>Total Expenses</b>	<b>( _____ )</b>	<b>( _____ )</b>	<b>( _____ )</b>
taxes below	( _____ )				

**Available Income** \$ \_\_\_\_\_ **Cash Flow** \$ \_\_\_\_\_

### Taxes

FIT W/H	\$ _____
SS/MC combined	_____
Soc Sec	_____
Medicare	_____
State	_____
City	_____
Other	_____
<b>Total</b>	<b>\$ _____</b>

**Do not write above this line**

### 3. Auto Operating Costs

Insurance	\$ _____
Gas	_____
Repairs	_____
Parking	_____
Other	_____
<b>Total</b>	<b>\$ _____</b>
Max Allowed	\$ _____

### 4. Auto Note Payments

Car 1	\$ _____
Car 2	_____
Car 3	_____
<b>Total</b>	<b>\$ _____</b>
1st Car Max Pmt Allowed is \$471	
2nd Car Max Pmt Allowed is \$332	

**Do not write above this line**

### 2. Housing and Utilities

Mortgage	\$ _____
Rent	_____
Electric	_____
Gas	_____
Water	_____
Phone	_____
Dues	_____
Other	_____
<b>Total</b>	<b>\$ _____</b>
Max Allowed	\$ _____
County	_____
Home Value	\$ _____
Amount Owed	\$ _____

Year	Make	Model	Value	Amt Owed	Pmt
_____	_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____

### 6. Child & Dependent Care

First pmt	\$ _____
Second pmt	_____
<b>Total</b>	<b>\$ _____</b>

### 8. Court Ordered Payments

Alimony	\$ _____
Child support	_____
Restitution	_____
Court costs	_____
<b>Total</b>	<b>\$ _____</b>

### 5. Health Care

Heal/Den Ins	\$ _____
Presc drugs	_____
Doc/Dent Pmts	_____
Hospital Pmts	_____
_____	_____
_____	_____
_____	_____
<b>Total</b>	<b>\$ _____</b>

### 7. Term Life & Misc Insurance

Paystub Life	\$ _____
Paystub AD&D	_____
Paystub LTD	_____
_____	_____
_____	_____
Pvt Policy 1	_____
Pvt Policy 2	_____
<b>Total</b>	<b>\$ _____</b>

### 9. Other Expenses

401k required	\$ _____
Union dues	_____
401k loan pmt	_____
_____	_____
_____	_____
<b>Total</b>	<b>\$ _____</b>

(List MC, VISA, AMEX, DISC, etc. first. List dept store-types second.)

10. Credit Cards	Limit	Owed	= Available	Payment
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____

**Total** \$ \_\_\_\_\_

## IX. Client Information Sheet: Fee Agreement

### Fee Agreement

I, \_\_\_\_\_ agree to the terms stated below. I understand that by signing this contractual agreement I am authorizing Jeff Parrack, CPA to represent me, and negotiate with IRS on my behalf for my Wage Levy Release with IRS, and/or other such work as is noted below. I understand that by giving my authorization I am responsible for payment to Mr. Parrack as detailed below.

Payment terms are simple:

1. A 50% payment is due upon signing this contract. Should Mr. Parrack fail to release my levy, this contract will become null and void and I will receive this payment back.
2. The final 50% payment is due when the Wage Levy Release has been negotiated.

There are NO exceptions to the above payment terms. I understand that if I cannot meet the terms above, I should NOT sign this agreement and begin the release until I can meet the above terms.

If payment is not made according to the above terms, I will be charged a \$25.00 per day surcharge. By signing below I agree to this daily surcharge.

If, after one week from the date of the completion of Mr. Parrack's work, I have not made complete and total payment of all fees and surcharges, I understand Mr. Parrack will contact IRS and reverse his negotiation and remove himself as my Power of Attorney, thus reinstating my Wage Levy without further contact with me.

Please sign below to indicate your approval for the work to be done. Please note that some work may become necessary after you send in these approval sheets. If so, you will be requested to approve the additional work required by IRS.

1. **\$695** Level 1 for one of the following: IRS Wage Levy Release (WLR), IRS Installment Agreement (IA), IRS Currently Non Collectible (CNC) status.
2. **\$895** Level 2 for any combination of WLR, IA, and/or CNC.
3. **\$197 each or \$895 for as many as are needed** Form 1040 original tax return preparation for any tax returns required by IRS.
4. **\$197 each or \$895 for as many as are needed** Form 1040 tax return preparation to replace tax returns previously prepared and filed by IRS. These returns are called "Substitute For Returns" (SFR) and our tax returns will be used only if they lower your tax.
5. **\$145** One-time fee for calculation of IRS Penalties and Interest on all years. This allows me to verify IRS's calculations and make sure they don't add unnecessary penalties.
6. **\$395** for cases with over \$100,000 owed to IRS due to special IRS requirements. Only applicable if your total amount due to IRS exceeds \$100,000.
7. **\$395** for cases managed by local IRS office Revenue Officers (RO) due to special IRS requirements. Only applicable if your case is being handled by an RO in an IRS Collection Office in a city near you and not being handled by Automated Collection Service (ACS).
8. Fee to be determined for IRS Penalty Abatement - must be successful or no fee will be charged. This fee is charged only if Penalty Abatement is requested and meets IRS conditions for abatement.
9. Additional fees for special services will be discussed on an individual basis prior to charge. Please understand that over 95% of my clients do not need special services.

\_\_\_\_\_  
Signature for approval of necessary fees

\_\_\_\_\_  
Date

## X. Credit Card or Debit Card Payment Authorization

I understand that you may not have all the money available in one place. Below is where you can fill out several credit cards, and select what amount you'd like put on each one.

You **absolutely, positively must** complete this sheet with your credit card or debit card info or I will not be able to start your work. You must give me your card number, expiration date, name on the card, and billing address for the card or I will not begin your work.

<b>First Card Number (required for work to begin):</b> _____				
<input type="checkbox"/> Visa	<b>Exp Date</b>	_____ / _____		
<input type="checkbox"/> MasterCard	<b>Name on Card</b>	_____		
<input type="checkbox"/> AMEX	<b>Billing Address</b>	_____		
	<b>Billing Address</b>	_____		
<input type="checkbox"/> Paypal (contact me)	<b>Signature</b>	_____		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
50% Deposit	50% 2nd Payment	All Payments	Specified Amount	

<b>Second Card Number:</b> _____				
<input type="checkbox"/> Visa	<b>Exp Date</b>	_____ / _____		
<input type="checkbox"/> MasterCard	<b>Name on Card</b>	_____		
<input type="checkbox"/> AMEX	<b>Billing Address</b>	_____		
	<b>Billing Address</b>	_____		
<input type="checkbox"/> Paypal (contact me)	<b>Signature</b>	_____		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
50% Deposit	50% 2nd Payment	All Payments	Specified Amount	

If you want to use more than two cards for payment, please copy this page.

Signature of Client: \_\_\_\_\_ Date: \_\_\_\_\_

## XI. IRS Wage Levy Release Checklists

### A. Checklist 1

This first section should be faxed *immediately*.

<input type="checkbox"/>	Sign the IRS Form 2848 - Power of Attorney. <b><i>Nothing</i></b> can be done without this form.	2 pages
<input type="checkbox"/>	Fill out the Personal Information Data Sheet accurately and legibly.	1 page
<input type="checkbox"/>	Fill out the Monthly Income & Expense Worksheet accurately and legibly.	1 page
<input type="checkbox"/>	Sign and date the Fee Agreement.	1 page
<input type="checkbox"/>	Fill out the Credit Card authorization Form accurately and legibly.	2 pages
<input type="checkbox"/>	If you have a copy of your Wage Levy, please include it	1 page

### B. Checklist 2

The following two items are ***absolutely*** required by IRS. You should fax them to me ASAP. I can still talk to IRS with your Power of Attorney form, and I will do that as soon as you fax it to me, but IRS will ***not*** release your Wage Levy without your paystubs and bank statements, so get them to me.

<input type="checkbox"/>	<b><i>3 months'</i></b> most recent paystub(s) with year-to-date totals.
<input type="checkbox"/>	<b><i>3 most recent</i></b> bank statements for <b><i>every</i></b> bank account under your and/or your spouse's Social Security Number or, if your business, your Social Security Number and/or Employer Identification Number.

### **C. Checklist 3 Additional Information Now Required By IRS**

This section may take you a while to gather, but be prepared to provide it. Many IRS representatives will require some or possibly all of this information if you have expenses in these categories; other IRS reps, however, may ask for only a few of these items or maybe even none at all. It is best to be prepared and have these items already faxed to me if you have expenses in these categories.

If my IRS rep who is handling my negotiation for you requests any of this info, I will contact you and tell you the numbers of the items requested.

<input type="checkbox"/>	1. 3 months of car payments (cancelled checks and a billing statement for each auto, if available). Payments can be circled on bank statements and noted as "car".
<input type="checkbox"/>	2. Copy of Lease Agreement if you rent your home, apartment, condo, etc. First page showing dollar amount and signature page
<input type="checkbox"/>	3. Copies of 3 most recent rental or mortgage payments (cancelled checks or receipts). Payments can be circled on bank statements and noted as "house" or "rent".
<input type="checkbox"/>	4. Copies of 3 most recent health insurance payments if not on paystub. Payments can be circled on bank statements and noted as "health insurance".
<input type="checkbox"/>	5. Copy of pharmacy printout of last 3 months' prescription drug purchases if over \$50 per month
<input type="checkbox"/>	6. Copies of other monthly medical payments, if claimed, such as doctors/dentists, hospitals, braces, supplies, etc.
<input type="checkbox"/>	7. Copies of any court-ordered payments, if claimed and not on paystub (child support, alimony, restitution, court costs, etc.)
<input type="checkbox"/>	8. Copies of the actual court orders for the above. Include the order's first page, the pages showing each amount to be paid, and the signature page. Other pages are not needed.
<input type="checkbox"/>	9. Copies of cancelled checks for child care payments for 3 months.
<input type="checkbox"/>	10. Other expenses claimed including utilities (cancelled checks and/or statements w/payment). These expenses are now available online for almost all utility companies.
<input type="checkbox"/>	11. Fax everything (including this "checked" checklist) to me at: 817-263-0770

You can see that IRS now wants verification of just about every monthly expense other than food, clothing, and household products. IRS is tightening up and requiring verification due to taxpayer and representative abuse in these areas in the past. Personally, I don't like being required to provide this additional information, but I understand IRS' position on it.

**After the checklist is completed in full, I will be able to begin your IRS Wage Levy Release. The sooner you finish, the sooner I can begin. Remember – if IRS gets to your paycheck before I do, I can still stop the Levy but neither I nor anyone else can get back for you the money your employer has already sent to IRS!**