Do you expect changes to income or health that may change your monthly expenses? If yes, explain:

Have you filed bankruptcy? ☐ YES ☐ NO If yes, complete the following:

District: Case Number: Chapter Number:

Judge's Name: Petition Date: Discharge Date:

Attorney's Name: Attorney's Phone Number:

DOCUMENTATION

You must submit the following documentation with your financial statement. **An installment agreement may be delayed if all required documentation is not included.**

1. Verification of income and expenses **for the past three months:**

   - Copies of all pay stubs and statements of any other income.
   - Copies of IRS tax payments for delinquent taxes and estimated payments.
   - Copies of allmony and child support payments.

In addition, **if self employed:**

   - Current balance sheet and income statements.
   - Annual balance sheets and income/expense statements for the last two years. (such as IRS FORM 1040 Schedule C).
   - Current list of accounts receivable (names, addresses, and balance due statements).
   - Current list of notes receivable (names, addresses, and balance due statements).

2. Bank information **for the past three months:**

   - Bank statements for all personal and business accounts.

3. Tax Returns:

   - We cannot process the installment agreement until all past due returns are filed.

4. Other:

   - Documentation and explanation of other household expenses that may exceed a reasonable amount.

If we approve your request, we agree to let you pay the tax you owe in monthly installments instead of immediately paying the amount in full. In return, you agree to make your monthly payments through electronic funds transfer (EFT). Additional information and instructions about EFT will be sent to you if your installment agreement is approved.

Under penalty of perjury, I declare that to the best of my knowledge and belief this statement of assets, liabilities and other information is true, correct and complete. I understand that a state tax lien may be filed (Government Code Section 7170-7173). I also understand that future state income tax returns must be filed when due and the tax liability paid in full or my installment agreement can be cancelled.

Taxpayer's signature	Spouse's signature	Date