

# Innocent Spouse Information Request

Your Name:

Your Social Security Number:

Please answer all questions that you can concerning the spouse and tax year(s) referenced in the letter you received with this form. Some questions may not apply to your particular facts and circumstances or the requested information may not be available.

1. How did you and your spouse participate in the preparation of the tax return(s) at issue? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Did your spouse ask you or your return preparer for an explanation of any items or amounts on the tax return(s)? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. What is your spouse's highest level of education? List any business courses completed. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. What is the current marital status between you and your spouse?  
(Please check or complete the items below that apply to you.)

Married  
 Divorced                      Date (month, day, year) \_\_\_\_\_  
 Legally Separated              Date (month, day, year) \_\_\_\_\_  
 Living Apart                      Date started (month, day, year) \_\_\_\_\_  
 Other (Please explain) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Provide copies of any divorce or separation agreements where you or your spouse agreed to pay the taxes for the year(s) at issue. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. During the tax year(s) at issue, did you and your spouse have joint or separate bank accounts, or both? Please list these accounts below:

Type of Account (Checking, Savings, etc.)	Financial Institution	Business or Personal	Joint Account or Separate*

\*If you had a separate account, did your spouse know about it? \_\_\_\_\_

7. What arrangements did you and your spouse have regarding money and payment of household bills?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8. How did you plan to pay the tax(es) at issue if not at the time you filed your return(s)? Was your spouse aware of your plan? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

9. If your return for the tax year(s) at issue received an audit, what return items, if any, changed? Were the changed items yours or your spouse'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 your spouse help you in the business? If so, how? If not, did your spouse know about your business affairs?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

11. If the items changed by audit were yours, did your spouse benefit from them? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12. Were any assets transferred between you and your spouse after the beginning of the earliest tax year at issue? Describe reasons for transfers and list dates of transfer. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_