IRS Form 433-A Attachments Required

(check space for each paragraph or put “N/A” for “not applicable”)

1. \_\_\_ Copy of your last Form 1040, income tax return, with all schedules and attachments.
2. \_\_\_ Proof of self-employment income for the **prior 3 months** (e.g., invoices, commissions, sales records, income statement).
3. \_\_\_ Proof of gross earnings and deductions for the past **3 months** from each employer (e.g., pay stubs, earnings statements). If year-to-date information is available, send only 1 such statement as long as a **minimum of 3 months** is represented.
4. \_\_\_ Proof of pension/social security/other income for the past **3 months** from each payor, including any statements showing deductions. If year-to-date information is available, send only 1 such statement as long as a **minimum of 3 months** is represented.
5. \_\_\_ Current bank statements (checking, savings, money market, and brokerage accounts) for the past **3 months** for all accounts.
6. \_\_\_ Statement from life insurance companies for each policy that includes type (e.g., term, whole life, universal) and cash/loan value amounts. If currently borrowed against, include loan amount and date of loan.
7. \_\_\_ Current statement from lender/lessor with monthly car payment amount and current balance of the loan for each vehicle purchased or leased.
8. \_\_\_ Current statement from lender with monthly payment amount and current balance for each piece of real estate owned.
9. \_\_\_ Proof of all current expenses that you paid for the past **3 months**, including rent, utilities, insurance, property taxes, etc.
10. \_\_\_ Proof of all non-business transportation expenses (e.g., car payments, lease payments, fuel, oil, insurance, parking, registration).
11. \_\_\_ Proof of payments for health care, including health insurance premiums, co-payments, prescriptions, monthly payments for prior medical bills and other out-of-pocket expenses, for the past **3 months**.
12. \_\_\_ Copies of any court order requiring payment and proof of such payments (e.g., cancelled checks, money orders, earning statements showing such deductions) for the past **3 months**.
13. \_\_\_ Copy of deed or contract for each real property owned
14. \_\_\_ Copy of deed of trust or mortgage, and note for each real property owned
15. \_\_\_ Copy of child support pursuant to Court order or voluntary agreement and proof of such payments (e.g., cancelled checks, money orders, earning statements showing such deductions) for the past **3 months**.
16. \_\_\_ Copy of garnishment or attachment order by court
17. \_\_\_ Copy of judgment(s)

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TIN: \_\_\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_\_\_\_