

IRS ESTATE & GIFT TAX EXAMINATION CUSTOMER SATISFACTION SURVEY

The IRS is trying to improve its service to the public. You can help in this important mission by answering the questions below. This voluntary survey should take less than five minutes to complete. When completing this survey, please mark your responses with an 'x' using a blue or black pen like this example . Do not mark outside of the response area like this example . Your responses will be kept anonymous to the IRS. If you have any questions about this survey, you may call The Survey Processing Center Helpline at 1-866-377-8208.

1

The questions that follow ask your opinion regarding how the IRS handled your most recent Estate & Gift Tax examination. For each question, *regardless of whether you agree or disagree with the final outcome*, please indicate your opinion by choosing a number from 1 to 5, where 1 means "Very Dissatisfied" and 5 means "Very Satisfied."

	Very Dissatisfied				Very Satisfied	Don't Know/Not Applicable
	1	2	3	4	5	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Explanation of why you were being examined.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
b. Explanation of the exam process.	<input type="checkbox"/>					<input type="checkbox"/>
c. Ease of understanding the notice regarding your initial appointment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
d. Time given you to provide requested information to the IRS.	<input type="checkbox"/>					<input type="checkbox"/>
e. Time the IRS took to respond to you.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
f. Flexibility of auditor in scheduling meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
g. Reasonableness of the information you were asked to provide.	<input type="checkbox"/>					<input type="checkbox"/>
h. Explanation of why records were required after initial appointment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
i. Business knowledge of your auditor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
j. Tax knowledge of your auditor.	<input type="checkbox"/>					<input type="checkbox"/>
k. Courtesy of your auditor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
l. Consideration given to the information you submitted.	<input type="checkbox"/>					<input type="checkbox"/>
m. Length of the exam process from start to finish.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
n. Amount of time you had to spend on the examination.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
o. Understanding that you have payment options.	<input type="checkbox"/>					<input type="checkbox"/>
p. Explanation of why adjustments were made.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
q. Fairness of treatment by the IRS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

2

Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your Estate & Gift Tax examination was handled?.....

Very Dissatisfied				Very Satisfied	Don't Know/Not Applicable
1	2	3	4	5	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3

Are you...?

- The taxpayer
- A tax professional who represented the taxpayer
- Someone else who represented the taxpayer

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please continue on next page

If you have been unable to resolve any specific problems with your tax matter through the normal IRS channels, or now face a significant hardship due to the application of the tax law, we encourage you to contact the Taxpayer Advocate Service at 1-877-777-4778.

4 Use this space for comments, or suggestions for improvement.

<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Paperwork Reduction Act Notice
The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP,1111 Constitution Ave. NW, Washington, DC 20224.

Thank you for completing the survey.
Please return this questionnaire by mail using the enclosed business return envelope.