

**Attachment A:  
Estate & Gift Customer Satisfaction Survey**

## Internal Revenue Service (IRS) Customer Satisfaction Survey Estate & Gift Tax Examination

The IRS is trying to improve its service to the public. You can help in this important mission by providing your feedback below. This voluntary survey should take less than 5 minutes to complete. Your identity will not be provided to the IRS. If you have any questions about this survey, please call the survey processing center at 1-888-260-0052.

The following questions 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 mark the appropriate circle next to the response that best applies to you.

### Initial Notification

#### To what extent...

	To a Great Extent					Don't Know/ Not Applicable
	Not At All				5	
	1	2	3	4	5	
1. Did the initial communications you received from the IRS (e.g., letters/notices, phone calls, IRS publications) provide you with enough information so that you knew what to expect during the examination?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### How satisfied are you with...

	Very Dissatisfied				Very Satisfied	Don't Know/ Not Applicable
	1	2	3	4	5	
2. The explanation of how long the examination process would take from start to finish?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The flexibility of auditor in scheduling meetings/calls?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### The Examination Process

	Very Dissatisfied				Very Satisfied	Don't Know/ Not Applicable
	1	2	3	4	5	
4. How well the IRS communicated with you throughout the examination process?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. The description of additional information the IRS auditor needed to complete the examination process?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. The explanation of why records were required?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The time you were given to provide the requested information to the IRS?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. The amount of time you had to spend on the examination?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. The professionalism of your auditor?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. The business knowledge of your auditor?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. The tax knowledge of your auditor?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Status of Examination

	Very Dissatisfied				Very Satisfied	Don't Know/ Not Applicable
	1	2	3	4	5	
12. The status updates provided to you during the examination?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. The accuracy of the status updates?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. The timeliness of the IRS auditor in responding to your inquiries?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Please continue on back*

**Resolution of Examination**

How satisfied are you with...

	Dissatisfied				Satisfied	Applicable
	1	2	3	4	5	
15. The explanation of why adjustments were made?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. The length of the exam process from start to finish?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Overall Satisfaction**

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

**Your Role**

18. Please tell us about yourself. With regards to this examination, were you...? (Check **one** only)
- Executor       Donor
  - Estate attorney that represented the executor or donor
  - Tax professional that represented the executor or donor
  - Someone else who represented the executor or donor
19. If you checked that you were the Executor or Donor, did you have someone represent you for this examination?
- Yes       No

**Your Comments**

20. Please provide any comments or suggestions for improvement.

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Occasionally, we conducted additional in-depth IRS-related research. Research participants may receive a small monetary incentive to participate depending on the research. If you are interested in participating in future research, please provide us with your telephone number and your e-mail address (if available). This information will not be shared with the IRS and will be used only for research purposes.

Telephone Number: (    ) \_\_\_\_\_ E-mail address: \_\_\_\_\_



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.

**Thank you for completing the survey.  
Please return this questionnaire to P.O. Box 64529, St. Paul, MN 55164-9614**

**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.

**Attachment B:  
Estate & Gift Survey Pre-Notification Letter**

[IRS LOGO]

[IRS DEPARTMENT LETTERHEAD]

[DATE]

13257B 0000001 \*\*\*\*\*SNGLP

JOHN Q & MARY Q SAMPLE

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2

SAMPLE ADDRESS 3

SAMPLE ADDRESS 4

SAMPLE ADDRESS 5

ANYTOWN, US 12345-6789

Dear JOHN Q & MARY Q SAMPLE:

I need your help with an important initiative I am undertaking to improve our service to America's taxpayers. I want to get feedback from taxpayers like you who have recently experienced an audit of their estate or gift tax returns.

In a few days, you will receive a questionnaire asking your opinions about the audit with IRS. Please direct this questionnaire to the person who had the most contact with IRS during the audit. The questionnaire should take less than 5 minutes to complete. Macro International, Inc. will hold your identity private and will provide your responses anonymously to the IRS. Your answers will be combined with others' to give us an overall assessment of customer satisfaction with estate or gift tax audits.

I am committed to improving IRS service to every taxpayer. Please help me in this effort by completing and returning the questionnaire as soon as possible. If you do not receive a questionnaire, please contact Macro International at 1-888-260-0052.

Sincerely yours,

John H. Imhoff, Jr.  
Director, Specialty Programs

**Attachment C:  
Estate & Gift Cover Letter 1**

# Macro International/ScanTron

IRS Customer Survey  
P.O. Box 64529  
St. Paul, MN 55164-0529

[DATE]

13257B 0000001 \*\*\*\*\*SNGLP

JOHN Q & MARY Q SAMPLE

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2

SAMPLE ADDRESS 3

SAMPLE ADDRESS 4

SAMPLE ADDRESS 5

ANYTOWN, US 12345-6789

Dear JOHN Q & MARY Q SAMPLE:

A few days ago you received a letter from John H. Imhoff, Jr., Director, Specialty Programs, asking for your help with an important research project. The IRS is committed to improving its performance and service to the American public. As part of this process, we are administering a nationwide survey to obtain feedback from a sample of individuals who had a recent audit of an estate or gift tax return.

Your name was selected for this survey through a random sample of those who were audited. We want to know your opinions regarding the audit process and the service you received. Your responses are critical to the accuracy of our evaluation of the IRS's service. If another person was primarily responsible for dealing with the IRS on this matter, please direct the survey to that person and encourage him or her to respond.

Macro International will hold your identity anonymous and will not provide any of your identifying information to the IRS. Your answers will be grouped with others, so that no individual reply can be traced back to a person or case number.

This brief survey should take less than 5 minutes to complete. We have included a postage-paid reply envelope for you to return your completed survey. If you have any questions or concerns, please feel free to contact Macro International at 1-888-260-0052.

Thank you in advance for your cooperation.

Sincerely,



Larry Luskin  
Project Director  
Macro International Inc.

# **Attachment D: Reminder Postcard**



## **Do We Have Your Input Yet?**

Recently, you received a questionnaire asking your opinions about the service you received from the IRS in a recent contact. If you have already completed and returned the questionnaire, please accept our sincere thanks. If not, please take a few minutes to complete it and return it today. We want to be sure we have your opinions and suggestions.

If you did not receive the questionnaire, or it got misplaced, please call 888-260-0052.

Larry A. Luskin  
Project Director

**Attachment F:  
Cover Letter 2 for Non-Respondents**

# Macro International/ScanTron

IRS Customer Survey  
P.O. Box 64529  
St. Paul, MN 55164-0529

[DATE]

13257B 0000001 \*\*\*\*\*SNGLP

JOHN Q & MARY Q SAMPLE

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2

SAMPLE ADDRESS 3

SAMPLE ADDRESS 4

SAMPLE ADDRESS 5

ANYTOWN, US 12345-6789

Dear JOHN Q & MARY Q SAMPLE:

Recently you received a survey requesting your feedback about your experiences during a recent IRS audit. So far, we have not received your completed survey. If you have not already completed the survey, please take a few minutes to fill in your responses. If another person was primarily responsible for dealing with the IRS on this matter, please direct the survey to that person and encourage him or her to respond.

As described in our previous communication, we are administering a nationwide survey among people who had a recent IRS audit of a tax return. Your name was selected for this survey through a random sample of those who were audited. We want to know your opinions regarding the audit process and the service you received. Your responses are critical to the accuracy of our evaluation of the IRS's service.

Macro International will hold your identity anonymous and will not provide any of your identifying information to the IRS. Your answers will be grouped with others, so that no individual reply can be traced back to a person or case number.

The survey should take less than 5 minutes to complete. We have included a postage-paid reply envelope for you to return your completed survey. If you have any questions or concerns, please feel free to contact Macro International at 1-888-260-0052.

Thank you in advance for your cooperation. The IRS is committed to improving its performance and service to the American public. A vital step in this process is to gather reliable information from those who have had contact with IRS employees and services. Your honest opinions will help bring about these changes.

Sincerely,



Larry A. Luskin  
Project Director  
Macro International Inc.