

Estate & Gift Tax Prenotification Letter

Dear

I need your help with an important initiative I am undertaking to improve our service to America's taxpayers.

In a few days, you will receive a survey asking your opinions about the service you received from the IRS in a recent audit of an estate or gift tax return. If you are not the person who had the most contact with the IRS on this matter, please direct the survey to the person who did.

This brief survey should take less than 5 minutes to complete. Pacific Consulting Group, an independent research firm, will provide your responses anonymously to the IRS. Pacific Consulting Group will not provide any of your identifying information to the IRS and will provide your responses to the IRS in aggregate totals only.

The IRS is committed to improving service to every customer. Please help us in this effort by completing and returning the survey as soon as possible. If you do not receive a survey, please contact the Survey Helpline at 1-866-960-7897.

Sincerely,

John H. Imhoff, Jr.
Director, Specialty Programs

L1_13523

Estate & Gift Tax Cover Letter

Dear

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 the process, we are administering a nationwide survey to obtain feedback from individuals who had a recent audit of an estate or gift tax return.

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.

Pacific Consulting Group/Scantron 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 the Survey Helpline at 1-866-960-7897.

To verify the authenticity of this survey, please visit IRS.gov and enter the search term "customer surveys." The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and as of this issuance should provide a reference to SB/SE Estate and Gift Tax Examination.

Thank you in advance for your cooperation.

Sincerely,

Dr. Peter Webb
Project Director
Pacific Consulting Group

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Estate & Gift Tax Questionnaire



EGT020009195200807

OMB # 1545-1432

Internal Revenue Service (IRS) Customer Satisfaction Survey

Estate and 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, you may call the Survey Helpline at 1-866-960-7897.

- 1** The following questions ask your opinion regarding how the IRS handled your most recent Estate and Gift Tax audit. For each question, regardless of whether you agree or disagree with the final outcome, please mark the circle that best represents your opinion. If a question does not apply to you, please mark "Not Applicable."

Initial Notification of Audit

| How satisfied are you with the... | Very Dissatisfied | Somewhat Dissatisfied | Neither Satisfied nor Dissatisfied | Somewhat Satisfied | Very Satisfied | Don't Know/Not Applicable |
|---|-----------------------|-----------------------|------------------------------------|-----------------------|-----------------------|---------------------------|
| a. Initial information the IRS provided (e.g., letters/ notices, phone calls, IRS publications) so that you knew what to expect during the audit process..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| b. Length of time from when you filed the return to the first contact from your auditor..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| c. Explanation of how long the audit 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"/> |
| d. Explanation of what information you needed to provide..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| e. Flexibility of your auditor in scheduling meetings..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Estate and Gift Tax Audit Process

| How satisfied are you with the... | Very Dissatisfied | Somewhat Dissatisfied | Neither Satisfied nor Dissatisfied | Somewhat Satisfied | Very Satisfied | Don't Know/Not Applicable |
|--|-----------------------|-----------------------|------------------------------------|-----------------------|-----------------------|---------------------------|
| f. Explanation of why more information was needed after the initial request..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| g. Amount of time you were given to provide information..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| h. Auditor's professionalism..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| i. Auditor's knowledge of the tax issues for your situation..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| j. Time your auditor took to respond to your questions.... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| k. Amount of time you personally had to spend on the entire audit process..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| l. IRS's communication with you throughout the audit process..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Completion of Audit

| How satisfied are you with the... | Very Dissatisfied | Somewhat Dissatisfied | Neither Satisfied nor Dissatisfied | Somewhat Satisfied | Very Satisfied | Don't Know/Not Applicable |
|--|-----------------------|-----------------------|------------------------------------|-----------------------|-----------------------|---------------------------|
| m. Length of audit process from start to finish..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| n. Explanation of the final decision for your audit, including any changes made..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| o. Notification of the completion of your audit..... | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Estate & Gift Tax Questionnaire

Overall Satisfaction

- 2** Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your Estate and Gift Tax audit was handled?
- | Very Dissatisfied | Somewhat Dissatisfied | Neither Satisfied nor Dissatisfied | Somewhat Satisfied | Very Satisfied | Don't Know/Not Applicable |
|-----------------------|-----------------------|------------------------------------|-----------------------|-----------------------|---------------------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Customer Profile

- 3** How long did you expect the audit to take from start to finish? (Write number of months.)

_____ Months

- 4** Were you informed about the status of your audit throughout the audit process?

- Yes
 No

- 5** With regards to this audit, are you the...

- Executor
 Donor
 Estate attorney who represented the executor or donor
 Tax professional who represented the executor or donor
 Someone else who represented the executor or donor

- 6** If you are the Executor or Donor, did you...

- Use a tax professional to represent you for this audit
 Represent yourself
 Both

- 7** Please provide any comments or suggestions for improvement.

Occasionally, we conduct 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: _____ Email 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 64530, St. Paul, MN 55164-0530

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.

Estate & Gift Tax Postcard Reminder

Do We Have Your Input Yet?

Recently, you received a survey asking your opinions about the service you received in a recent interaction with the IRS. If you have already completed and returned the survey, please accept our sincere thanks. If not, please take a few minutes to complete and return it today. We want to be sure we have your opinions and suggestions for improving the IRS's service to the public.

If you did not receive the survey, or it got misplaced, please contact us at 1-866-960-7897.

Dr. Peter Webb
Project Director
Pacific Consulting Group

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Estate & Gift Tax Cover Letter for Non-Respondents

Dear

Recently you received a survey requesting your feedback about your experiences during a recent IRS audit of your estate or gift tax return. 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 have had a recent IRS audit of an estate or gift tax return. 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.

Pacific Consulting Group 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 the Survey Helpline at 1-866-960-7897.

To verify the authenticity of this survey, please visit IRS.gov and enter the search term "customer surveys." The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and as of this issuance should provide a reference to SB/SE Estate and Gift Tax Examination.

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,

Dr. Peter Webb
Project Director
Pacific Consulting Group

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