

**IRS SB/SE Estate and Gift
Phone Focus Group Recruiting Guide**

Recruiting instructions:

- Recruit total of four groups based on lists provided: three with tax professional representatives, one with taxpayers.
- Recruit 6 participants for each of the four groups

Hello, I'm _____ and I'm calling from PMR and Pacific Consulting Group. Our consulting firm has been asked by the Internal Revenue Service ("Service") to gather information about taxpayer interactions with the Estate and Gift Tax Division. According to our information, [your client has/you have] been involved in an Estate and Gift Tax audit

1. Is this correct?

Yes (continue)

No (TERMINATE)

2. Are you the person with the most involvement in dealing with the Estate and Gift tax audit?

Yes (continue)

No—may I please speak with the person most involved? *[Repeat introduction paragraph]*

We are setting up a one-hour phone focus group interview of taxpayers to better understand the service you received and your service needs. This is NOT a call about your specific case. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

Your participation with this research is voluntary, but your help on this project would be very much appreciated. As a token of our appreciation for your time, you will receive \$50. Are you interested in participating? *[If no, thank taxpayer for their time, and hang up]*

The focus group will be held via telephone on *[enter date/time]*. All participants will call in to a toll-free number to join the conference call. The discussion will last about one hour. You will be joined by a group of up to 6 people who, like you, have experience with the IRS' **Estate and Gift Tax exam** process. You will not be asked about your specific tax situation, only about your experience with this process. Would you be able to participate? *[If no, thank them and terminate the call]*.

1. Are you or is anyone in your immediate family an employee of the IRS?

_____ Yes *[explain, thank, and terminate the call]*

_____ No

2. To confirm, does *[date/time]* work for you? This is the only time slot available.

[Recruiter: recruit about 9 to get 6 to show, mix males and females]

_____ Yes
_____ No [explain, thank, and terminate the call]

3. [Recruiter: note male or female]

_____ Male
_____ Female

We are delighted that you will participate in our group.

The dial in number is: [ENTER number]
The access code is: [ENTER number]

Do you have any questions? We would like some contact information to confirm the meeting and to mail out the token of appreciation for your participation.

Respondent Name _____

Respondent Address _____

We would also like to give you a reminder call on the day of the group. Would we reach you at this number or another? [record number _____]

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, you may write to the IRS.

READ ONLY IF RESPONDENT ASKS FOR ADDRESS: Send your comments and suggestions to:

Internal Revenue Service,
Tax Products Coordinating Committee,
Room #IR-6406
1111 Constitution Ave. NW,
Washington, DC 20224.

Thank you and have a nice day. We look forward to speaking with you on: [ENTER date/time]

For record keeping:

_____ Confirmation letter mailed or faxed
_____ Reminder call made

REMINDER CALL

Hello, I'm _____ and I'm calling from PMR. This is a call to remind you of your participation in the telephone focus group about your Estate and Gift Tax experience scheduled for (DATE AND TIME). The dial in number is: NUMBER. The access code is: CODE#. Do you have any questions? (PAUSE AND ANSWER QUESTIONS). Thank you in advance for your participation.