

The Individual Taxpayer Burden Survey is an important project that can benefit you and millions of other taxpayers.

We hear from taxpayers that preparing and filing tax returns are time consuming and expensive. We are conducting a survey of randomly selected taxpayers to learn more about those costs.

Responses from taxpayers will help us update estimates of the amount of time and money people spend preparing their tax returns each year. We use this information to learn how to reduce taxpayer burden. All information provided will be used for internal research purposes only.

Only those taxpayers randomly selected may participate in the study. Data is being collected over the course of the next year, so you may still be selected even if you have not yet received an invitation. Participation for those selected is voluntary. However, understanding the tax preparation experience of taxpayers will help the IRS reduce taxpayer burden.

If you have been selected, we hope you will decide to participate in this study. We estimate that it will take about 15 to 20 minutes to complete.

A copy of the survey, which is being conducted by Westat on behalf of the IRS, is provided in the link provided below. Together we have an opportunity to advance our understanding of taxpayer burden. Thank you.



DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, D.C. 20224

[WESID]

[NAME]

[ADDR 1]

[ADD 2]

[CITY, STATE, ZIP]

[DATE]

Dear Taxpayer:

I am writing to ask you to take part in an important survey that can benefit you and millions of other taxpayers.

We hear from taxpayers that preparing and filing tax returns are time consuming and expensive. This survey will allow the IRS to learn more about those costs.

Your responses to the survey will make it possible for the IRS to update estimates of the amount of time and money people spend preparing their tax returns each year. We use this information to learn how the IRS might reduce taxpayer burden. Let me assure you that all information you provide will be used for internal research purposes only.

Participation is voluntary. You are not required to join in the study. However, your tax preparation and filing experiences will provide information that will help the IRS reduce taxpayer burden.

To see the official IRS announcement regarding this survey, please visit the following URL on the IRS website: <http://www.irs.gov/taxstats/indtaxstats/article/0,,id=237672,00.html>.

I hope you will decide to participate in the survey, which is being conducted by Westat on behalf of the IRS. Together we have an opportunity to advance the understanding of taxpayer burden. Thank you.

Sincerely,

Rosemary D. Marcuss  
Director  
Office of Research, Analysis, and Statistics

# Survey Instructions

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## 1 Go to the website.

To take the survey online, please go to  
**[www.IRStaxpayerburdensurvey.org](http://www.IRStaxpayerburdensurvey.org)**.

## 2 Log in.

You will need the following username and password to access the survey.

**Username: [UID]**  
**Password: [PWD]**

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### Problems?

If you have any technical difficulties, including problems with the website, please call 1-888-848-0934 or send an email to [IRStaxpayerburdensurvey@westat.com](mailto:IRStaxpayerburdensurvey@westat.com).

## Individual Taxpayer Burden Survey



# Frequently Asked Questions

### What is the purpose of this survey?

The purpose of this survey is to provide Congress and the President with accurate estimates of the time and money taxpayers spend to follow federal tax rules and regulations. Tax administrators and policy makers use this information to reduce and manage taxpayer burden.

### Who should complete this survey?

The person in your household most involved in the completion of your 2010 individual federal income tax return should complete this survey.

### How will my answers be used?

Your responses to the survey will make it possible for the IRS to update estimates of the amount of time and money people spend preparing their tax returns each year. The IRS uses this information to learn how to reduce taxpayer burden. All information you provide will be used for internal research purposes only.

### Why should I participate?

While participation is voluntary, information about your tax preparation experience will help the IRS better understand how to reduce taxpayer burden. We encourage you to take a few moments of your time to participate. By doing so, you will ensure that households like yours are represented.

## How long will this survey take?

It will take about 15 to 20 minutes to complete this survey. Your time may vary based on your individual experiences.

## What kinds of questions are in this survey?

In addition to some general questions about you and your taxes, this survey asks about:

- Recordkeeping
- Tax planning
- Resources used to gather materials and prepare your return
- Completing your tax return
- Time spent on tax-related activities
- Costs of completing your tax return
- Your overall experiences completing your tax return

## I don't have access to the web. What are my options?

If you don't have access to the web, or if you would prefer to complete a paper version of the survey, please call 1-888-848-0934. We will mail you a paper survey and a postage-paid return envelope.

## Can I take this survey in Spanish?

Yes. Please call 1-888-848-0934 or send an email to [IRStaxpayerburdensurvey@westat.com](mailto:IRStaxpayerburdensurvey@westat.com) for a Spanish version of this survey.

## Who can I contact with questions?

If you have questions about the content of this survey, please contact Jocelyn Newsome at 1-888-848-0934 or send an email to [IRStaxpayerburdensurvey@westat.com](mailto:IRStaxpayerburdensurvey@westat.com). If you would like to speak to someone at the IRS, please call the Communications & Liaison office at 202-622-6440 or send an email to [\\*public\\_liaison@irs.gov](mailto:*public_liaison@irs.gov).

**We hope you will take the time  
to complete this important survey.  
Thank you.**



## Individual Taxpayer Burden Survey

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**Internal Revenue Service  
c/o Westat  
1600 Research Blvd, RE134  
Rockville, MD 20850-3129**

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**RETURN SERVICE REQUESTED**

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## Phone and IVR Prompt

“The IRS recently mailed you a survey. Your responses to the survey will help the IRS better understand how much time and money people spend preparing their tax returns each year. We use this information to learn how to reduce taxpayer burden. Your participation is voluntary and all information you provide will be used for research purposes only. It will take about 15 to 20 minutes to complete the survey. We hope you will complete the survey as soon as you can. If you have already completed your survey, thank you. If you have any questions you can call us toll free at 1-888-848-0934.”

NOTE TO INTERVIEWER: IF RESPONDENT REQUESTS, ADMINISTER SURVEY OVER PHONE.



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