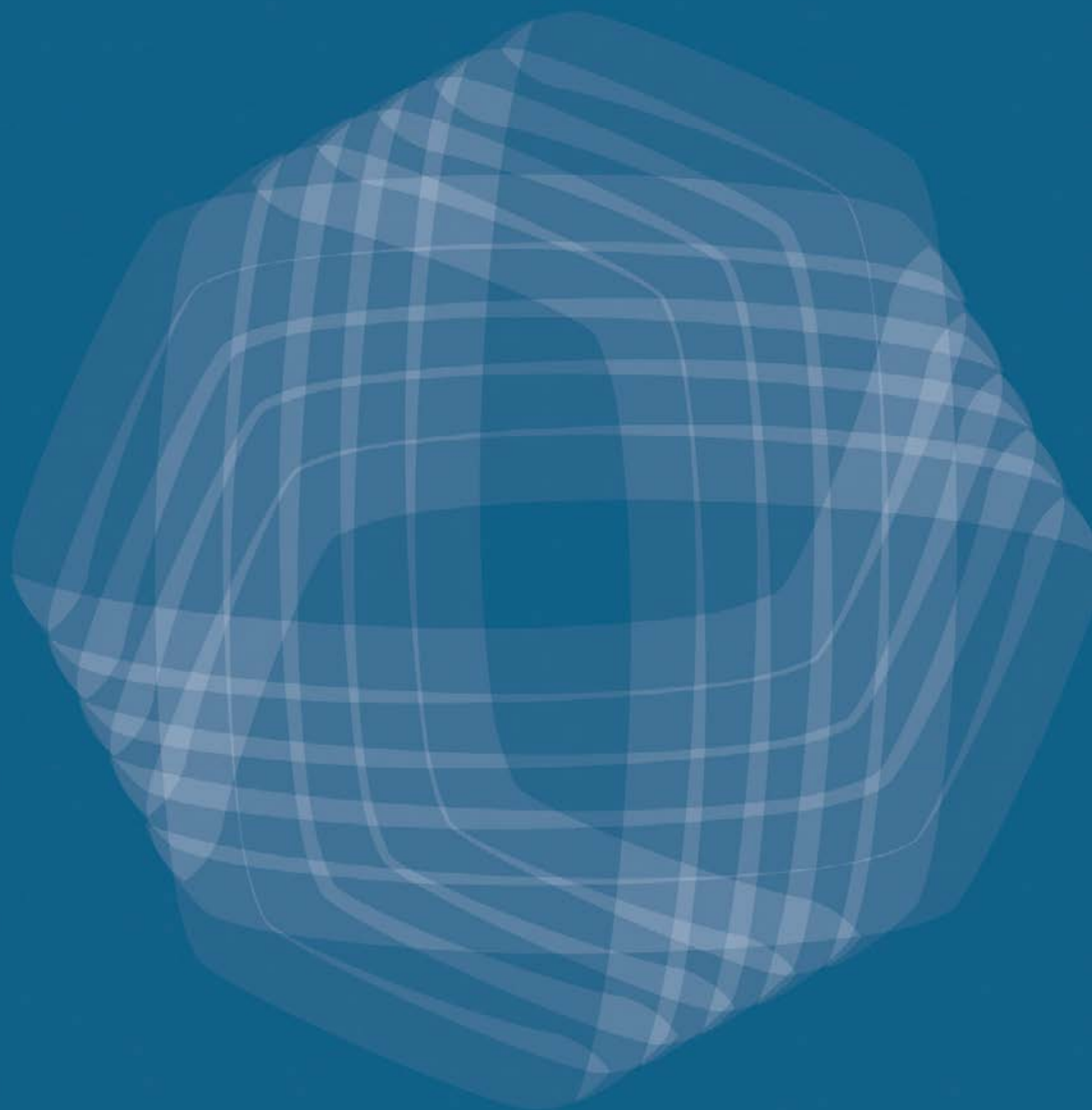




Individual Taxpayer Burden Survey



Your experience matters to us.

ITB

Want to take the
survey on the web?

See the back cover
for instructions

IRS Individual Taxpayer Burden Survey

Frequently Asked Questions

What's this survey about?

This survey provides Congress with accurate estimates of the time and money you, your spouse (if you filed jointly), relatives, business employees, friends, or unpaid volunteers spent to complete your 2019 individual federal income tax return.

You won't be asked about specific income or other financial information.

How will my answers be used?

We'll use your responses for research purposes only. Your responses will help tax administrators and policy makers reduce and manage taxpayer burden. Participation is voluntary, but the information you provide will ensure that households like yours are represented.

Who should complete this survey?

The person in your household most involved in the completion of your 2019 individual federal income tax return should complete the survey. This may be you or your spouse (if you filed jointly). You may need to ask others who helped you complete your 2019 individual federal income tax return for input.

Your individual federal income tax return refers to Form 1040, 1040A, or 1040EZ, as well as any associated forms, schedules, and worksheets that you completed or filed. It does not include forms associated with state and local income taxes, partnerships, corporations, estates, employment taxes, excise taxes, or anyone else's individual federal income tax return.

Should I send this to my tax professional?

No, this survey is about the time and money that **you** spent, not your tax professional.

How long will this survey take?

This survey should take about 15 to 20 minutes to complete.

Who can I contact with questions or concerns about the survey?

If you have questions about the content of this survey, please contact Kimberly Wyborski at 877-828-3122 or send an email to IRStaxpayerburdensurvey@forsmarshgroup.com. If you would like to speak with someone at the IRS, please call 877-374-6217.

To read the official IRS announcement regarding this survey, please visit www.irs.gov/statistics/itb19.

Si desea contestar la encuesta en español, por favor vaya a la contraportada para ver las instrucciones de cómo contestar la encuesta por Internet. Si prefiere solicitar una encuesta impresa en español, puede llamarnos al 877-828-3122 o enviarnos un correo electrónico a IRStaxpayerburdensurvey@forsmarshgroup.com.



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Instructions:

Please use a black or blue pen.

Mark to indicate your answer.

If you want to change your answer, darken the box and mark the correct answer.

General Questions About Your Taxes

The questions below ask about the ways in which you completed your 2019 federal income tax return.

1. How did you complete your 2019 federal income tax return?

Mark all that apply.

- I did it myself using paper forms
- I used a tax preparation website, software, or mobile app (e.g., TurboTax®, TaxAct®, or H&R Block® At Home)
- I had expert assistance from someone such as a paid preparer, a paid professional (e.g., a bookkeeper, enrolled agent, accountant, or lawyer), an employee of my business, or an unpaid volunteer

2. Why did you choose this method for completing your 2019 federal income tax return?

Mark all that apply.

- Ease of use
- Time
- Familiarity with method
- Cost
- To ensure that my tax return was completed accurately
- To receive all the deductions, credits, and refunds for which I was qualified To
- reduce the risk of audit
- Other, *please describe:*



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Recordkeeping

The following questions ask about the records, including forms you may have received from your employer or financial institutions, as well as tax-related documents you may have kept in order to prepare your 2019 federal income tax return.

3. Whether or not you used them, which of the following types of information did you keep for your 2019 federal income tax return?

Mark all that apply.

- Prior year federal income tax returns, including your 2018 federal income tax return
Such as 1040, 1040A, or 1040EZ forms
- Documentation of non-business income
Such as W-2s, interest, dividends, sales of stock, royalties, rental income, alimony received, IRA distributions, pension distributions
- Documentation of non-business deductions
Such as educator expenses, moving expenses, alimony paid, home mortgage interest, property taxes, charitable contributions, casualty and theft losses, unreimbursed employee expenses
- Documentation of business income and expenses
Such as invoices, business bank account statements, partnership or S corporation income, cancelled checks, taxes and licenses, advertising costs, depreciation
- Documentation of credits
Such as the earned income tax credit (EITC), child tax credit, child and dependent care credit, education credit
- Other tax-related items, *please describe:*

4. Thinking about all the records you kept for your 2019 federal income tax return, did you also keep them for other reasons, such as business or personal reasons?

- Yes
 No



Tax Planning

The following section asks about any tax-related planning you may have done for your 2019 federal income tax return. Tax planning includes any strategies taxpayers use to reduce the taxes they owe, such as participating in a retirement account, making charitable donations, or buying or selling assets.

5. Whether or not you did them, did you consider the tax implications of any of the following as part of your overall planning for your 2019 federal income tax return?

Mark all that apply.

- Buying or selling real estate, including purchasing a home to deduct real estate taxes and mortgage interest
- Participating in or maintaining a retirement account such as a 401(k), any type of IRA, or a pension plan
- Investing in non-retirement tax-exempt or tax preferred investments or plans such as tax-free bonds or education savings programs
- Buying or selling other investments such as stocks, bonds, or other securities
- Buying or disposing of assets such as equipment or supplies for a business, including any decisions made for section 179 accelerated depreciation expenses
- Structuring your business, such as deciding whether to form a partnership, LLC, or corporation
- Making charitable donations
- Making energy efficient improvements to your home in order to claim an energy tax credit
- Taking college or other educational classes in order to claim the American opportunity tax credit
- Other, *please describe:*

- None of the above



Completing Your Tax Return

The next question asks about any resources you may have used when completing your 2019 federal income tax return.

6. Which, if any, of the following resources did you use when completing your 2019 federal income tax return?

Mark all that apply.

- IRS website
- IRS toll-free tax assistance line
- IRS walk-in site
- IRS tax forms or publications from a library or post office
- IRS2GO mobile app
- TV, newspapers, or magazines
- Tax preparation website, software, or mobile app
- Internet search engines
- Social media or blogs
- Seminars or classes
- None of the above

The next questions ask about the ways in which you completed your 2019 federal income tax return.

7. Who (if anyone) helped you, however briefly, with your 2019 federal income tax return?

Mark all that apply.

- My spouse
- Other family members or friends
- Employee of my business
- Tax professional (paid or volunteer)
- Other, *please describe:*

- No one helped me



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8. Which of the following best describes how you used IRS tax form instructions when completing your 2019 federal income tax return?

- Read most or all instructions
- Read instructions as needed
- Did not read instructions

9. If you used a paid or volunteer tax professional, how did you work with them when completing your 2019 federal income tax return?

Mark all that apply.

- Did not use a paid or volunteer tax professional
- Completed a tax questionnaire or worksheet for my paid or volunteer professional
- Provided records to my paid or volunteer professional
- Met with my paid or volunteer professional in person
- Communicated with my paid or volunteer professional by telephone or email
- Completed and reviewed my tax return with my paid or volunteer professional
- Other, *please describe:*

10. If you used a tax preparation website, software, or mobile app to complete your 2019 federal income tax return, which of the following best describes your use of the program?

- Did not use a tax preparation website, software, or mobile app
- Followed the entire step-by-step computer-guided instructions
- Only used the step-by-step computer-guided instructions to address specific tax areas
- Directly entered information into the tax forms without using the step-by-step computer-guided instructions

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11. When preparing your 2019 federal income tax return, did you or your preparer electronically import any of the following information so that it did not have to be typed or entered by hand?

Mark all that apply.

- Did not electronically import any information
- Data from last year's tax preparation software
- Data from an accounting software package, such as Quicken, MSN Money, or QuickBooks
- Data from my W-2s
- Data from my 1098s, 1099s, Schedule K-1s, or other information returns Data
- from my bank, brokerage, or other financial accounts
- Don't know

12. Was there anything that made completing your 2019 federal income tax return more difficult than you expected?

Yes → *Please describe*

No

Time Spent on Tax-Related Activities

The questions on the next page ask about the time you spent on activities related to the completion of your 2019 federal income tax return.

Please include time spent:

- On your federal income tax return, including Form 1040, 1040A, or 1040EZ, as well as any associated forms, schedules, and worksheets that you completed or filed
- Throughout the tax year as well as the tax filing season
- By family, friends, or business employees, however briefly
- Traveling to places such as the library, post office, or a tax preparer's office

Please do not include time spent:

- On state or local income tax returns
- On anyone else's federal income tax return
- Responding to IRS notices or correspondence
- Amending your 2019 federal income tax return
- On partnerships (Form 1065), corporations (Form 1120 or 1120S), estates (Form 706), gifts (Form 709), trusts (Form 1041), employment tax (Form 940, 941, 943, 944, 945), or excise tax (Form 720)

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13. How much time did you spend on the following activities for your 2019 federal income tax return?
If you're not sure, please provide your best estimate.

Recordkeeping

Include time spent throughout the tax year on activities such as:

- Keeping track of tax-related information, such as records or receipts
- Collecting and organizing your tax-related records
- Making a special effort to obtain records or receipts

Do not include time spent on non-tax-related business or personal recordkeeping.

			:		
Hours				Minutes	

No time spent

Tax planning

Include time spent throughout the tax year on activities such as:

- Calculating or changing withholding or estimated payments
- Researching strategies to reduce the taxes you owe such as making charitable donations, participating in a retirement account, or buying or selling investments
- Working with a tax professional (paid or volunteer) on tax planning
- Doing business tax planning related to your personal tax situation

Do not include any time spent on financial planning that was not tax-related

			:		
Hours				Minutes	

No time spent

Gathering or purchasing materials

Include time spent on activities such as:

- Gathering IRS tax forms, instructions, or publications
- Selecting, buying, and installing tax preparation software or mobile app
- Selecting a tax preparation website
- Selecting a tax professional (paid or volunteer)

			:		
Hours				Minutes	

No time spent

Completing and submitting your tax return

Include time spent on activities such as:

- Reading instructions and related materials
- Obtaining answers to questions about your return
- Completing and reviewing tax forms or worksheets, whether or not they were submitted
- Working with a tax professional (paid or volunteer) to complete your tax return
- Assembling and submitting your tax return
- Checking the status of your electronic submission
- Checking the status of your refund

			:		
Hours				Minutes	

No time spent



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14. Did you spend any time on any of the following before realizing you did not need to report on them?

Mark all that apply.

- Itemized deductions
- Child Tax Credit or Additional Child Tax Credit
- Earned Income Tax Credit
- Education deductions or credits
- Credit for the Elderly or the Disabled
- Quarterly estimated taxes
- Unreimbursed business expenses
- Alternative Minimum Tax
- Depreciation or amortization
- Other, *please describe:*

No ➔ **GO TO TOP OF PAGE 9**

15. Of the time you spent completing and submitting your tax return (reported in Question 13), how much of it did you spend on these tax provisions before realizing you did not need to report on them?

If you're not sure, please provide your best estimate.

			:		
Hours				Minutes	



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Costs of Completing Your Tax Return

The next questions ask about the costs associated with the completion of your 2019 federal income tax return.

Please include costs:

- Associated with your federal income tax return, including Form 1040, 1040A, or 1040EZ, as well as any associated forms, schedules, and worksheets that you completed or filed
- Incurred throughout the tax year as well as the tax filing season

Please do not include costs associated with:

- State or local income tax returns
- Anyone else's federal income tax return
- Responding to IRS notices or correspondence
- Amending your 2019 federal income tax return
- Partnerships (Form 1065), corporations (Form 1120 or 1120S), estates (Form 706), gifts (Form 709), trusts (Form 1041), employment tax (Form 940, 941, 943, 944, 945), or excise tax (Form 720)

16. How much did you pay for the following products or services to complete your 2019 federal income tax return?

If you're not sure, please provide your best estimate.

Paid preparer services

Include tax preparation or tax planning advice

Do not include any fees for an early or immediate tax refund

\$.

Dollars **Cents**

No money spent

Tax preparation website or software costs

Include the purchase price as well as live advice fees

Do not include any fees for an early or immediate tax refund

Do not include any general purpose accounting software, such as Quicken, MSN Money, or QuickBooks

\$.

Dollars **Cents**

No money spent

Fees for an early or immediate tax refund

Include any fees paid for an early or immediate tax refund, such as a refund anticipation loan, check, or rapid refund

\$.

Dollars **Cents**

No money spent

Tax books, classes, or seminars

\$.

Dollars **Cents**

No money spent

Postage, filing fees, or travel costs

Include costs associated with submitting your return, such as electronic filing fees, fees charged for paying your taxes by credit card, postage, faxes, courier fees, or any travel

\$.

Dollars **Cents**

No money spent



Draft

17. Paid preparer services are often paid as one fee. We know it may be difficult to separate the cost for your 2019 federal income tax return from additional services provided. Were any of the following services included in the cost you reported under paid preparer services in Question 16?

Mark all that apply.

- Did not pay a fee to a paid preparer
- Prepared forms for a partnership, corporation, estate, gift, trust, employment tax, or excise tax
- Electronic filing fees
- Prepared state, local, or city tax returns
- Amended previous year tax returns
- Responded to IRS notices or an audit
- Audit protection costs
- None of the above
- Don't know

Tell Us About You

18. For which states did you file a 2019 state income tax return?

- Did not file a 2019 state income tax return

19. Compared to other taxpayers, how would you rate your knowledge, skills, and abilities in completing your 2019 federal income tax return?

- Better than most taxpayers
- About the same as most taxpayers
- Not as good as most taxpayers

20. What is the highest level of education that you have completed?

- Less than a high school diploma
- High school graduate or GED
- Some college or some technical school
- Associate's degree or professional certificate
- Bachelor's degree
- Master's or doctorate degree



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21. Tax forms may be difficult, especially if English is not your primary language. Do you feel that you had any language limitations that made completing your 2019 federal income tax return more difficult?

Yes

No

22. When completing your 2019 federal income tax return, how stressful was each of the following?

	Not at all stressful	A little stressful	Somewhat stressful	Very stressful	I did not do this activity
Recordkeeping throughout the year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax planning throughout the year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Selecting or using a tax preparation software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Selecting or working with a tax professional	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gathering your tax records (e.g., W-2s, expense records)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Determining which forms to use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finding copies of the tax forms you needed at the library, post office, IRS website, or other location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding IRS forms, instructions, and publications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Determining how a life change affected your tax situation (e.g., birth of a child, divorce, retirement)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deciding which credits and deductions you qualified for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Submitting your tax return electronically or by mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wondering if your return will be audited	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, <i>please describe</i> : <div style="border: 1px solid black; height: 30px; width: 100%; margin-top: 5px;"></div>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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0123456789

Tell Us About Your Preferences

23. The IRS currently contacts taxpayers by mail. How would you prefer that the IRS contact you or send you tax-related information?

Mark all that apply.

- Mail
- E-mail
- Home phone
- Work phone
- Cell phone
- Text message
- Via my paid preparer

24. The IRS now offers taxpayers the option of creating an online account. Which of the following features would you find most useful?

Mark all that apply.

- Personal profile that allows the IRS to send you information tailored to your tax filing situation
- Ability to customize information on the IRS website that meets your interests
- Access to prior-year tax returns
- Online payment options
- Access to tax payment history
- Ability to upload supporting documentation when you file your return or in response to an IRS notice
- Immediate error check when filing your taxes online
- Other, *please describe:*

25. How likely are you to create an online taxpayer account?

- I already have an online taxpayer account
- Very likely
- Somewhat likely
- Not at all likely → *Please tell us why not*



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26. Please share any suggestions you have for how the IRS could improve taxpayer services or make it easier for you to file and pay your taxes.

A large, empty white rectangular box intended for the respondent to provide suggestions for improving IRS services.

Thank you for completing our survey.

Privacy Act and Paperwork Reduction Act Notice for Individual Taxpayer Burden Data Collection

Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. §§ 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to analyze the role of taxpayer burden in tax administration. This information is also used to fulfil the IRS's statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. This information will also help us to better understand taxpayer needs and burden reduction opportunities.

Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected as required by law. We estimate that it will take 15 to 20 minutes to complete this survey, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Providing the information is voluntary; not providing all or part of the information requested will have no impact on you but may reduce our ability to address taxpayer concerns regarding paperwork reduction.

We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2212. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

Web Survey Instructions

If you prefer to complete this survey on the web, please follow the instructions below. Web responses are processed more quickly, and you won't receive follow-up mail.

1 Go to the website.

Visit www.IRSBurdenSurveys.org to take the secure online survey.

2 Log in.

Use this PIN to access the survey: **[PIN]**

Problems?

If you have any technical difficulties, including problems with the website, please call 877-828-3122 or send an email to IRStaxpayerburdensurvey@forsmarshgroup.com.

Instrucciones para contestar la encuesta por Internet

Si prefiere contestar la encuesta por Internet, puede hacerlo siguiendo las instrucciones a continuación. Las respuestas en Internet se procesan más rápido y ayudarán a asegurar que usted no reciba más comunicados.

1 Vaya a la página de Internet.

Para contestar la encuesta segura en Internet, vaya a la página: www.encuestataxcargaIRS.org

2 Ingrese a la encuesta.

Para ingresar a la encuesta, necesitará el siguiente PIN: **[PIN]**

¿Dificultades?

Si tiene alguna dificultad técnica, incluyendo problemas con la página de Internet, puede llamarnos al 877-828-3122 o enviarnos un correo electrónico a IRStaxpayerburdensurvey@forsmarshgroup.com.