

## **IRS CUSTOMER EXPERIENCE SURVEY**

### **Estate & Gift Tax**

The IRS is trying to improve its service to the public. You can help in this important mission by answering the questions below. This voluntary survey should take less than 5 minutes to complete. If you have any questions about this survey, you may contact the Survey Helpdesk at [SBSE.CXSurvey@irs.gov](mailto:SBSE.CXSurvey@irs.gov).

#### **Privacy and Paperwork Reduction Act Notice**

Our authority for requesting information with this survey is U.S.C. Section 301, and 26 U.S.C. Sections 7801, 7803, and 7805. The information you provide allows the IRS to analyze interactions between the IRS and taxpayers. This information will also help us to improve taxpayer service. 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. The information that you provide will be protected as required by law. We estimate that it will take less than 5 minutes to complete this survey, including the time for reviewing instructions and completing 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 taxpayer service. 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 1545-1432. Send comments regarding this burden estimate for completing the survey 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:SP, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

#### **Estate & Gift Tax Customer Experience**

The following questions ask your opinion regarding how the IRS handled your recent Estate and Gift Tax audit. For each question, **regardless of whether you agree or disagree with the final outcome**, please indicate your answer by checking the box that best represents your opinion. If a question does not apply to you, please mark "Don't Know/Not Applicable."

1. First, think about your experiences **throughout the process of your Estate and Gift Tax audit**. Please rate your satisfaction with the following (*choose one response for each question*):
  - a. Length of the audit process from start to finish
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied

- Very Satisfied
  - Don't Know/Not Applicable
  - b. Amount of time you had to spend on the audit process
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable
  - c. Fairness of treatment during the audit
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable
  - d. How well the IRS kept you informed of the status of your case
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable
2. Next, consider **your interactions with the auditor and other IRS employees**. Please rate your satisfaction with the following (*choose one response for each question*):
- a. Auditor's tax knowledge
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable
  - b. Auditor's professionalism
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable

- c. Time your auditor took to respond to your questions
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable
  - d. IRS communication with you throughout the audit process
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable
3. During your audit, did you work with your auditor or other IRS employees **in person**?  
(Choose one)
- Yes
  - No
4. Now, think about **the information that the IRS provided to you** about the audit. Please rate your satisfaction with the following (*choose one response for each question*):
- a. Explanation of how long the audit process would take from start to finish
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable
  - b. Explanation of what information you needed to provide
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied
    - Don't Know/Not Applicable
  - c. Explanation of why more information was needed after the initial request
    - Very Dissatisfied
    - Somewhat Dissatisfied
    - Neither Dissatisfied nor Satisfied
    - Somewhat Satisfied
    - Very Satisfied

£ Don't Know/Not Applicable

d. Notification of the completion of your audit

£ Very Dissatisfied

£ Somewhat Dissatisfied

£ Neither Dissatisfied nor Satisfied

£ Somewhat Satisfied

£ Very Satisfied

£ Don't Know/Not Applicable

e. Explanation of the final decision for your audit, including any changes made

£ Very Dissatisfied

£ Somewhat Dissatisfied

£ Neither Dissatisfied nor Satisfied

£ Somewhat Satisfied

£ Very Satisfied

£ Don't Know/Not Applicable

5. During this audit, did you do any of the following? *(Select all that apply)*
- £ Received documents from the IRS electronically
  - £ Sent documents to the IRS electronically
  - £ None of the Above
6. Please rate your satisfaction with **sending documents electronically**. *(Choose one)*
- £ Very Dissatisfied
  - £ Somewhat Dissatisfied
  - £ Neither Dissatisfied nor Satisfied
  - £ Somewhat Satisfied
  - £ Very Satisfied
7. How long did you expect the audit to take from start to finish? *(Text Box – Restricted to Numbers)*
- \_\_\_\_\_ Months
8. **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 audit was handled? *(Choose one)*
- £ Very Dissatisfied
  - £ Somewhat Dissatisfied
  - £ Neither Dissatisfied nor Satisfied
  - £ Somewhat Satisfied
  - £ Very Satisfied
9. Rate your level of agreement with: This interaction **increased my trust** in the IRS. *(Choose one)*
- £ Strongly Disagree
  - £ Somewhat Disagree
  - £ Neither Disagree nor Agree
  - £ Somewhat Agree
  - £ Strongly Agree
10. With regard to this audit, are you the... *(Choose one)*
- £ Executor (A person named in the will and/or empowered by the court to administer an estate) *(If selected, continue to Q11)*
  - £ Donor (A person that makes a gift) *(If selected, continue to Q11)*
  - £ Estate attorney who represented the executor or donor *(If selected, skip to Q12)*
  - £ Tax professional who represented the executor or donor *(If selected, skip to Q12)*
  - £ Someone else who represented the executor or donor *(If selected, skip to Q12)*

11. If you are the Executor or Donor, did you... (*Choose one*)

£ Use a tax professional to represent you for this audit

£ Represent yourself

£ Both

12. Please provide any comments or suggestions for improvement. (*Open-ended*)

Occasionally, we conduct additional in-depth research. If you are interested in participating in future research, please provide us with your name, telephone number and email address (if available). This information will not be shared outside of IRS Research and will only be used for the purpose of survey research.

Name: \_\_\_\_\_

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 tax law, we encourage you to contact the Taxpayer Advocate Service at 1-877-777-4778.

If you have any questions about this survey, you may contact the Survey Helpdesk at [SBSE.CXSurvey@irs.gov](mailto:SBSE.CXSurvey@irs.gov).

Thank you for completing the survey.