Individual Taxpayer Burden Survey

What is the Individual Taxpayer Burden Survey?

This survey provides 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. By taxpayer burden, we mean all of the time and money spent during the course of the year by you, your spouse, business employees, friends, or relatives to complete your 2013 individual federal income tax return.

Please be assured that you will not be asked about specific income or other financial information. All information you provide will be used for research purposes only. 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 2013 individual federal income tax return should complete this survey. Your individual federal income tax return refers to Form 1040, 1040-A, or 1040-EZ, 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.

What if someone else did my taxes?

You may need to consult with others when completing this survey, and we encourage you to do so. However, please do not have your tax professional complete this survey for you, and do not include the time spent by a tax professional on your behalf. We are interested in your experiences.

Questions?

If you have further questions about how to complete this survey, please contact Stephanie Beauvais Denning at 1-888-848-0934 or send an email to IRStaxpayerburdensurvey@westat.com. If you would like to speak with someone at the IRS, please call 1-888-452-0904.

Instructions:

Please use a black or blue pen to complete this form.

Mark ☒ to indicate your answer.

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

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This question focuses on the time you spent on activities related to the completion of your 2013 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

Time throughout the tax year as well as the tax filing season

Time spent by family, friends, or business employees, however briefly

Time spent 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

Time spent on anyone else's federal income tax return

Time spent responding to IRS notices or correspondence

Time spent amending your 2013 federal income tax return

Time spent 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)

1. How much time did you spend on the following activities for your 2013 federal income tax return?

Recordkeeping

Include time spent throughout the tax year:

- *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:

- *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:

- *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:

- *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 mailing 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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The next questions ask about the costs associated with the completion of your 2013 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

Costs 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

Costs associated with anyone else's federal income tax return

Costs associated with responding to IRS notices or correspondence

Costs associated with amending your 2013 federal income tax return

Costs associated with 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)

2. How much did you pay for the following products or services to complete your 2013 federal income tax return?

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

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 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 costs

$ ☐☐☐☐☐ . ☐☐
Dollars Cents

☐ No money spent

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3. **Was there anything that made completing your 2013 federal income tax return harder than you expected?**

☐ Yes → *Please tell us why*

☐ No

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

The Privacy Act of 1974 states that when we ask you for information, we must first tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if you do not provide it and whether or not you must respond under the law.

Our legal right to ask for this information is 5 U.S.C. 301.

The primary purpose for requesting the information is to analyze the role of taxpayer burden in tax administration. We will also use the information to fulfill the IRS' 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. We will also use the information provided to better understand taxpayer needs and burden reduction opportunities.

Tax information may be disclosed only as provided by 26 U.S.C. 6103. Providing the information is voluntary.

OMB No: 1545-2212. This report is authorized under the Paperwork Reduction Act. 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 to the fullest extent allowable under the Freedom of Information Act (FOIA). Public reporting burden for this collection of information is estimated to average 10 minutes, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Avenue, NW, Washington, DC 20224.