

IRS CUSTOMER EXPERIENCE SURVEY

ESTATE AND GIFT TAX EXAMINATION

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. Your identity will not be provided to the IRS. If you have any questions about this survey, you may call the Survey Helpline at 800-521-7177. Please use black or blue ink to complete the survey.

Q1 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."

Initial Notification of Audit

How satisfied are you with the...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/ Not Applicable
a. Explanation of how long the audit process would take from start to finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Explanation of what information you needed to provide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Estate and Gift Tax Audit Process

How satisfied are you with the...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/ Not Applicable
c. Explanation of why more information was needed after the initial request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Auditor's professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Auditor's tax knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Time your auditor took to respond to your questions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Amount of time you had to spend on the audit process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. IRS communication with you throughout the audit process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Fairness of treatment during the audit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Completion of Audit

How satisfied are you with the...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/ Not Applicable
j. Length of the audit process from start to finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Explanation of the final decision for your audit, including any changes made	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Notification of the completion of your audit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q2 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?

Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/ Not Applicable
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q3 How long did you expect the audit to take from start to finish?

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Months

Q4 Were you informed about the status of your audit throughout the audit process?

☐ Yes ☐ No

Q5 Did you send documents to the auditor electronically using any of the following methods? (Select all that apply)

- ☐ No, I did not send documents electronically.
- ☐ E-mail
- ☐ E-fax
- ☐ E-signature
- ☐ Third-party website (LeapFILE, Hightail, ShareFile, Dropbox, etc.)
- ☐ Taxpayer Digital Communication
- ☐ IRS Document Upload Tool
- ☐ Other (specify below)

Q6 Did you receive documents from the auditor electronically using any of the following methods? (Select all that apply)

- ☐ No, I did not receive documents electronically.
- ☐ E-mail
- ☐ E-fax
- ☐ E-signature
- ☐ Third-party website (LeapFILE, Hightail, ShareFile, Dropbox, etc.)
- ☐ Taxpayer Digital Communication
- ☐ Other (specify below)

Q7 If you sent or received documents electronically, how did you consent to the electronic transmission of documents?

- ☐ I did not send or receive documents electronically
- ☐ Written consent
- ☐ Verbal consent
- ☐ Other (specify below)

Q8 Did the auditor advise you that electronic communications are not necessarily secure?

- ☐ Yes
- ☐ No

Q9 With regards to this audit, are you the...

- ☐ Executor (A person named in the will and/or empowered by the court to administer an estate)
- ☐ Donor (A person that makes a gift)
- ☐ Estate attorney who represented the executor or donor
- ☐ Tax professional who represented the executor or donor
- ☐ Someone else who represented the executor or donor



If you are NOT the Executor or Donor, skip to Q11

Q10 If you are the Executor or Donor, did you...

- ☐ Use a tax professional to represent you for this audit
- ☐ Represent yourself
- ☐ Both

Q11 Rate your level of agreement with: This interaction increased my trust in the IRS.

- ☐ Strongly Disagree
- ☐ Somewhat Disagree
- ☐ Neither Agree nor Disagree
- ☐ Somewhat Agree
- ☐ Strongly Agree

Q12 Please provide any comments or suggestions for improvement.

Occasionally, we conduct additional in-depth IRS-related research. Research participants may receive a small monetary incentive to participate depending on the research. If you are interested in participating in future research, please provide us with your telephone number and your email address (if available). This information will not be shared with the IRS and will be used only for the purpose of survey research.

Telephone number:

Enter your 10-digit phone number
Print one digit in each square

Email address:

Enter your email address using all capital letters.

If you have been unable to resolve any specific problems with your tax matter through the normal IRS channels, or 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 or www.taxpayeradvocate.irs.gov.

Privacy Act 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 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.

Thank you for completing the survey.

Please return this questionnaire to Fors Marsh, PO Box 5703, Hopkins, MN 55343-5703.