

DEBTORS TAX REFUND REQUEST FORM

****NO REFUND WILL BE GRANTED WITHOUT PROPER DOCUMENTATION****

DEBTOR(S) NAME: _____ CASE NO: _____

1. DOES THE PLAN GIVE TRUSTEE DISCRETION TO DETERMINE TAX REFUND DISPOSABLE INCOME? _____
 - a. **IF NO** – YOU MUST SUBMIT A STIPULATION AND PROPOSED ORDER OR AMENDMENT DEPENDING ON THE REQUIREMENTS OF THE JUDGE
 - b. **IF YES** – CONTINUE WITH THIS FORM.

2. TOTAL NET TAX REFUND: \$ _____ TAX YEAR: _____
 - a. AMOUNT OF TAX REFUND TO BE RETAINED BY DEBTOR(S)? _____

3. REASON FOR REFUND REQUEST? _____

4. LIST OR DESCRIBE SUPPORTING **ATTACHED** DOCUMENTATION: _____

5. AGI FROM CURRENT YEAR TAX RETURNS _____
6. GROSS ANNUAL INCOME FROM SCHEDULE I _____

7. HAS THE DEBTOR(S) REQUESTED PRIOR REFUNDS? _____
 - a. IF SO, WHAT TAX YEAR AND HOW MUCH? _____

8. IF MORTGAGE PAID INSIDE THE PLAN – ARE MORTGAGE PAYMENTS CURRENT? _____

DATE: _____

DEBTOR SIGNATURE: _____

CO-DEBTOR SIGNATURE: _____

DEBTORS ATTORNEY SIGNATURE: _____

TRUSTEE CASE ANALYSTS COMMENTS: _____

PERCENTAGE BEING PAID TO UNSECURED CREDITORS: _____

ARE PLAN PAYMENTS CURRENT TO THE TRUSTEE? _____

IF NOT, AMOUNT OF THE ARREARS? _____

TRUSTEE:

_____ APPROVES THE REQUEST IN THE AMOUNT OF \$ _____

_____ DENIES THE REFUND REQUEST. REASON: _____

TRUSTEE'S SIGNATURE: _____