

INCOME TAX RETURN AND REFUND PROCESS

RETURN

During each year that you are in an active Chapter 13 bankruptcy case you are required by the court to forward a copy of the federal income tax return you filed with the IRS to the Trustee's office. The Trustee only needs the 1040 portion (pages 1 and 2) of the return UNLESS you have business income or loss on Line 12 of your return, in which case the Trustee needs a complete Schedule C. The copy of the Tax Return should be sent to the Trustee or to your attorney's office (if so instructed by your attorney) as soon as possible after it is filed with IRS.

If you are not required to file a tax return for any given year, please contact your attorney so that he or she can assist you in preparing an affidavit as to why a tax return is not required. That affidavit should be provided to the Trustee as soon as possible after the beginning of each year but at a minimum by the deadline for filing the return with IRS (typically April 15th).

If you request an extension from the IRS for filing your tax return, please provide a copy of that request for extension and copies of any W-2's and/or 1099's to the Trustee when filed no later than the deadline for filing it with the IRS (typically April 15th).

If you file an amended tax return, you must also send a copy of that document to the Trustee.

Please black out or redact complete social security numbers on all pages for all persons and all bank account information for direct deposit of refund amounts on the return. This information is not needed by the Trustee. Please write your case number on the top of page one of the tax return.

You should receive a reminder letter from this office in January of each year regarding this process. Please be sure that the Trustee has a good mailing address for you so that you receive this and all correspondence.

If you have not yet provided the Trustee or your attorney with a copy of the most recent tax return you've filed with the IRS and any pending extension, please bring a copy of those documents with you to your scheduled 341 meeting.

REFUND

Do not spend anything over \$2,000.00 of any Tax Refund you receive during your case without first talking to your attorney.

Address for sending copies of tax documents:

1. EMAIL (PDF FORMAT): Trumantaxreturns@ch13ftw.com
2. FAX: 817-770-8518
3. US MAIL : CHAPTER 13 TRUSTEE
6851 NE LOOP 820 #300
N RICHLAND HILLS TX 76180