



How to Complete IRS Form 9465

Installment Agreement Request

Form 9465, Installment Agreement Request is used to request a monthly installment plan if you cannot pay the full balance shown on your tax federal tax return by April 15 or on the date listed on your federal tax bill.

Get form 9465 <https://www.irs.gov/pub/irs-pdf/f9465.pdf>

Boxes 1–6:

Fill this information in with your current information.

Box 7:

If you owe on several years, you need to have a total of all years that you owe on for this line. If you recently filed the tax returns, you can use the amount on the returns that you filed, but if you have already received notices from the IRS then you will need to ensure you have notices for all of the years that you owe for and then total those up to obtain the number to place on this line. You want this to be as accurate as possible.

Box 8:

If you are filing this form with a tax return and sending it with a partial payment, or just sending this form in with a payment, write the amount of the payment on this line.

Box 9:

Enter the difference between line 7 and line 8 here.

Box 10:

Enter the amount you are proposing to pay the IRS each month on this line. Know that if the amount you put on this line is not going to pay the taxes in full within 6 years, then you will get a letter from the IRS within a few weeks to a few months stating they cannot accept your payment proposal without financial information being provided.

Box 11:

This is the number that if your proposed payment is less than this, expect to have to provide financials. You are able to submit this form with a Form 433F (Financial statement) and send it in. They may ask for verification of information on the 433F once they receive it and review it.

Box 12:

You can choose any due date between the 1st and 28th of each month. This date is the date the IRS has to have the payment in their offices. So if you get paid on the 10th and want to send your payment out of that check, make your due date the 15th at the earliest so you have time to mail it and it arrive and be noted in their computer system. If you make your due date the 1st, and they receive your payment on the 25th of the month prior, they may mark it for payment in the prior month which could risk your payment plan defaulting, so be careful when choosing a due date.

Box 13:

This section only needs to be filled out if you are wanting your payment to be automatically debited out of your bank account. It takes about 2 months for this to start so know you will need to mail in your payments until you receive a letter from the IRS stating they will begin to deduct your payment and give you a date they will start.

Box 14:

Ensure you sign and date this form it is will not be processed.

Boxes 15-27:

You only need to fill this part out if you have had a payment plan in the last 12 months that defaulted or if you owe more than \$25K but not more than \$50K and your proposed payment amount does not show it will pay the amount you owe in full in 72 months.



Advanced Solutions. Real Results.



NEED TAX HELP?
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Call [\(720\) 319-8954](tel:7203198954) or visit us at trueresolvetax.com