

# IRS INSTALLMENT AGREEMENT REQUEST

Please read the following before completing the worksheet below:

- If you have an existing installment agreement with the IRS, STOP here. You can't have another Installment Agreement. Call IRS instead to add your new tax owed to your existing plan.
- The maximum term for a streamlined agreement is 72 months
- Any refund will be applied against the amount you owe. If your refund is applied to your balance, you're still required to make your regular monthly installment payment.
- You will still be charged interest and may be charged a late payment penalty on any tax not paid by its due date, even if your request to pay in installments is granted. Interest and any applicable penalties will be charged until the balance is paid in full. Current interest rate is 5% every 3 months and late payment penalty is 0.5% per month.
- IRS charge a user fee to set up an installment agreement. The amount of the user fee can vary depending on whether you use the online payment application and how you propose to make your monthly payments. For details, see the table below.

Payment Method	Applicable Fee	
	Using the online payment application**	Not using the online payment application. Filing Form 9465
Direct debit/withdrawal	\$31	\$107
Check, money order, credit card, or debit card	\$149	\$225

\*\* by applying online at <https://www.irs.gov/payments/online-payment-agreement-application> instead of filing Form 9465

- If you can pay the full amount you owe within 120 days, you can avoid paying the fee to set up an installment agreement. You can apply for a short-term payment plan by using the online payment agreement (OPA) application at [IRS.gov/OPA](https://www.irs.gov/OPA) or call the IRS at 800-829-1040.

## WORKSHEET

We only set up installment agreement request by filing Form 9465.

Do you have an existing installment agreement with the IRS? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, STOP here. Call IRS to add your new tax owed to your existing plan.

If no, please complete the worksheet below.

Name			
Amount of initial payment you're making with this request	\$		
Do you want to pay it by ( <b>check one</b> )	check/online payment?	direct-withdrawal?	
If by check, ask for a voucher. If by direct-withdrawal, please provide your bank information.			
Routing Number			
Account Number			
Amount you can pay each month	\$		
Which day of the month you want to make your payment? No later than the 28 <sup>th</sup>			
Do you want to pay by ( <b>check one</b> )	check/online payment?	direct-withdrawal?	
If by check, ask for vouchers. If by direct-withdrawal, please provide your bank information.			
Routing Number			
Account Number			

Signature: \_\_\_\_\_

Date: \_\_\_\_\_