Claim for Refund and Request for Abatement

Use Form 843 only if your claim involves one of the taxes shown on line 3a or a refund or abatement of interest, penalties, or additions to tax on line 4a.

**Note:** Do not use Form 843 if your claim is for—

- An overpayment of income taxes;
- A refund of fuel taxes; or
- An overpayment of excise taxes reported on Form 720, 730, or 2290.

<table>
<thead>
<tr>
<th>Name of claimant</th>
<th>Your social security number</th>
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<tbody>
<tr>
<td>Address (number, street, and room or suite no.)</td>
<td>Spouse's social security number</td>
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<tr>
<td>City or town, state, and ZIP code</td>
<td>Employer identification number</td>
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Name and address shown on return if different from above

Daytime telephone number

1. Period—prepare a separate Form 843 for each tax period
   
   From _______ , 19___ to _______ , 19___

   2. Amount to be refunded or abated

   $ _______

3a. Type of tax, penalty, or addition to tax:
   - Employment
   - Estate
   - Gift
   - Excise (other than excise taxes reported on Form 720, 730, or 2290)
   - Penalty IRC section

b. Type of return filed (see instructions):
   - 706
   - 709
   - 940
   - 941
   - 990-PF
   - 4720
   - Other (specify)

4a. Request for abatement or refund of:
   - Interest caused by IRS errors and delays (under Rev. Proc. 87-42—see instructions).
   - A penalty or addition to tax as a result of erroneous advice from the IRS.

b. Dates of payment

5. **Explanations and additional claims.** Explain why you believe this claim should be allowed, and show computation of tax refund or abatement of interest, penalty, or addition to tax.

**Signature.** If you are filing Form 843 to request a refund or abatement relating to a joint return, both you and your spouse must sign the claim. Claims filed by corporations must be signed by a corporate officer authorized to sign, and the signature must be accompanied by the officer's title.

Under penalties of perjury, I declare that I have examined this claim, including accompanying schedules and statements, and, to the best of my knowledge and belief, it is true, correct, and complete.

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<tr>
<th>Signature (Title, if applicable. Claims by corporations must be signed by an officer.)</th>
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Signature

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For Paperwork Reduction Act Notice, see separate instructions.