

**Office of Tax Shelter Analysis (OTSA)  
Questionnaire for participants of 2009 Nationwide Tax Forum (NTF)**

The purpose of this questionnaire is to solicit your opinion on how OTSA can better serve the tax profession community in gathering and reporting relevant information on tax motivated and abusive transactions. The survey is voluntary and should take only 5 minutes of your time to complete.

1. Please answer the following regarding your knowledge both prior and after attending this forum where applicable:

	Prior		After
Do you know what a reportable transaction is?	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you know what the § 6707A penalty is and when it is applicable?	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you know when a Form 8886, <i>Reportable Transaction Disclosure Statement</i> , is required to be filed with a tax return and OTSA?	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you know when a Form 8918, <i>Material Advisor Disclosure Statement</i> , is required to be filed with OTSA?	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you know how to report a potentially abusive transaction to OTSA using the OTSA Hotline?	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you filed a Form 8886 for yourself or a client?	Yes <input type="checkbox"/> No <input type="checkbox"/>		
Have you filed a Form 8918 for yourself or a client?	Yes <input type="checkbox"/> No <input type="checkbox"/>		
Do you use the site IRS.Gov, Tax Professionals section regularly?	Yes <input type="checkbox"/> No <input type="checkbox"/>		

If you use another source(s) for your IRS tax profession updates, please list below:

2. The current reportable transaction categories requiring disclosure are: Listed, Confidential, Contractual Protection, §165 Loss, and Transaction of Interest (TOI). Please provide any suggestions you may have for other areas we should be looking at.
3. What other suggestions do you have which may help OTSA receive information on current abusive transactions?

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Thank you for your feedback!



