

Request for Conference to Review Proposed Assessment or Refund Denial

GENERAL INSTRUCTIONS:

PLEASE READ:

- **DO** use this form if you disagree with either the amount due on a Notice of Proposed Assessment or the Department's denial of your request for a refund.
- **DO** attach a copy of the Proposed Assessment or Refund Denial, as well as any supporting documents.
- **DO NOT** submit this form if you want to request an installment payment agreement, seek a penalty waiver, or submit an offer in compromise based on ability to pay. These forms are available online in the General Purpose Forms section of the Department of Revenue's website.
- **DO NOT** submit this form if you have not received a Denial of Refund letter from the Department. A conference will not be granted for a "deemed denial" of a refund claim.

LINE BY LINE INSTRUCTIONS:

Section 1 - Choose Conference Type

- Check the appropriate box for the type of protest.

Section 2 - Tax Information

- If you received a Notice of Proposed Assessment from the Department showing an amount due, enter the Case ID listed on the Notice, if available.
- Fill in your Account Number, if available.
- Check the tax type(s) included on the Notice of Proposed Assessment or the Refund Denial.
- Check the appropriate box if you are being assessed as either (i) a responsible person for a sales tax liability or (ii) as a successor to a prior business.
- Enter the tax periods from the Notice of Proposed Assessment or Refund Denial.

Section 3 - Taxpayer Contact Information

- Enter the Taxpayer's name (for a business or an individual).
- Enter the email address where Departmental Representatives may communicate with you.
- Enter your Employer Identification Number or Social Security Number (if you do not have an Employer Identification Number).
- Enter Taxpayer's Address (number, street and room or suite no., city, state, ZIP code).

Section 4 - Representative Information

- If you are being represented by an attorney, accountant or other third party, complete this section. Attach a Power of Attorney Form authorizing the representative to act for the Taxpayer.

Section 5 - Conference Request

- Check the appropriate box indicating whether you would like to have your conference by telephone or in person at the Department's Nashville, Tennessee office.

Section 6 - Reason for Disputing Proposed Assessment or Refund Denial

- Provide a detailed explanation as to why you believe the Proposed Assessment or Refund Denial is incorrect. All supporting documentation must be received at least two weeks prior to the date of the conference.

Section 7 - Signatures

- The Taxpayer or Authorized Representative must sign the form.