



STATE OF CALIFORNIA  
**FRANCHISE TAX BOARD - Legal Branch**  
PO Box 3070  
Rancho Cordova CA 95741-3070

KATHLEEN CONNELL  
Chair

JOHAN KLEHS  
Member

B. TIMOTHY GAGE  
Member

July 14, 1999

**FTB NOTICE 99-7**

**SUBJECT: SETTLEMENT BUREAU CORRESPONDENCE**

Effective immediately, taxpayers seeking to initiate settlement of their civil tax matter disputes should write to:

Lorrie K. Inagaki  
Director, Settlement Bureau  
Franchise Tax Board  
P.O. Box 3070  
Rancho Cordova CA 95741-3070

FAX (916) 845-4747  
Message Line (916) 845-5034

Settlement requests should include:

- Taxpayer's name and current address
- If taxpayer is represented by another:
  - Representative's name, current address, fax, and telephone number
  - Copy of representative's power of attorney (FTB 3520)
- Taxpayer's Social Security or taxpayer identification number
- Tax or income year(s) involved
- Tax amount involved
- Present status of dispute (i.e., protest, appeal or claim for refund)
- Good faith settlement offer, including the factual and legal grounds in support of the offer

Detailed information regarding the settlement process may be found in FTB Notice 98-11, issued on July 13, 1998.

The following individuals are available to answer questions you may have regarding the settlement program:

Lorrie K. Inagaki (916) 845-3303  
Director, Settlement Bureau

Lisa Ann Garrison (916) 845-4912  
Manager, Settlement Bureau

Marvin Halpern (916) 845-3316  
Supervising Tax Counsel,  
Settlement Bureau

For further information regarding this notice, please contact Lisa Ann Garrison at the Franchise Tax Board, Legal Branch, P.O. Box 3070, Rancho Cordova, CA 95741-3070, (916) 845-4912.

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