Your Tax Notice Response Preparation Checklist

Name / business: _____ Period: _____ Review date: _____

For each item mark Ready / Missing / Not applicable. This is an organizer, not a qualification score.

[ ] Agency, notice number and tax year recorded

[ ] All pages and envelope retained

[ ] Response deadline calendared with an earlier review date

[ ] Authenticity checked through official channels if uncertain

[ ] Filed return and filing confirmation gathered

[ ] Payment confirmations gathered

[ ] Relevant income/expense records and prior correspondence gathered

[ ] Reviewer assigned and contacted promptly

[ ] Sensitive records shared only through an appropriate secure channel

[ ] Response method and any applicable rights/deadlines confirmed

[ ] Copies and submission evidence retained

[ ] Follow-up date scheduled; no assumption that a call extends the deadline

My action plan

Issue: _____

Missing document: _____

Responsible person: _____

Deadline confirmed by advisor: _____

Follow-up date: _____

Next step: Request a complimentary, no-commitment introductory call through https://911taxplanner.com/contact/ to identify the appropriate review. Do not send tax returns or sensitive identifiers through the public contact form. Se habla español.

General education—not individualized tax, legal, accounting or investment advice. Eligibility, deadlines and outcomes depend on the facts and applicable rules. No professional relationship is created without an engagement agreement.