

IRS Notice Response Checklist

Steps to handle an IRS letter calmly & correctly

How to Use

Check each box as you gather documents. Bring this checklist to your appointment or upload it with your files.

Read & Verify

Identify the notice number (e.g., CP2000, CP14) and tax year

Confirm your name/SSN and response deadline

Compare figures to your filed return and records

Respond

Gather support (W-2/1099s, receipts, transcripts)

Draft response explaining facts; include notice barcode page

Send by certified mail or respond online if available; keep copies

Disclaimer: For educational purposes only. This checklist is not tax advice. Consult Royale Advisors for guidance specific to your situation.