IRS NOTICE CHECKLIST

What to Gather Before Your Review

Use this checklist to organize the IRS notice, tax records, correspondence, and supporting information that may be needed to understand the issue and determine the next step.

START WITH THE NOTICE

Bring or securely provide every page of the IRS letter, including attachments and inserts.

1. Notice Summary

Complete what you can directly from the notice before your review.

Date notice received: _____	**IRS notice / letter number:** _____
Tax year or period: _____	**Response deadline:** _____
Amount shown as due (if any): _____	**Taxpayer / business name:** _____
Best callback number: _____	**Preferred email:** _____

2. What Does the Notice Appear to Involve?

☐ Balance due or payment request

☐ Missing or unfiled tax return

☐ Proposed change to a tax return

☐ Identity verification

☐ Penalty or interest question

☐ Collection notice, levy, or garnishment

☐ Payroll or business tax issue

☐ Request for additional information or documents

☐ Refund or credit adjustment

☐ Other / unsure

3. Documents to Gather

Bring what applies to your situation. Do not worry if you do not have everything yet.

IRS Correspondence

☐ Complete IRS notice or letter - all pages

☐ Earlier IRS notices related to the same issue

☐ Copies of letters or responses previously sent to the IRS

☐ Notes from prior phone calls with the IRS, including dates and names if available

Tax Returns & Income Records

☐ Most recent federal tax return

☐ Prior-year returns related to the notice

☐ W-2s, 1099s, K-1s, or other income documents for the tax period

☐ Business income and expense records, if applicable

Payment & Account Records

☐ Proof of tax payments already made

☐ IRS payment-plan or installment-agreement information

☐ Bank records or canceled checks relevant to the issue

☐ Account transcripts or IRS account records, if available

Supporting Records

☐ Documents specifically requested in the notice

☐ Receipts, statements, mileage records, or deduction support relevant to the issue

☐ Identification documents needed for identity-verification matters

☐ Business payroll or employment-tax records, if applicable

4. Create a Short Timeline

A simple timeline helps connect the notice to what happened before and after it.

DATE	WHAT HAPPENED / COMMUNICATION / PAYMENT / FILING
_____	_____
_____	_____
_____	_____

5. Before Your Review

A few steps can make the consultation more productive.

☐ Read the entire notice and note the response deadline.

☐ Keep the original notice and make a copy for your records.

☐ Gather only documents that relate to the tax year or issue in question.

☐ Write down any questions you want answered during the review.

☐ Do not submit Social Security numbers, tax returns, banking records, or other sensitive documents through the general website contact form.

☐ Use the secure document method provided by Premier Alliance when sensitive records are requested.

6. Questions to Bring to the Review

☐ What is the IRS asking me to do?

☐ What deadline applies?

☐ What documents or records are still missing?

☐ Does a return need to be filed or corrected?

☐ Are payment or collection options relevant to my situation?

☐ What should happen next, and who is responsible for each step?

7. Notes

Important

This checklist is for organizational and informational purposes. Premier Alliance Advisory Group provides tax preparation, document organization, notice review, and administrative support. Representation before the IRS is provided only when applicable through an authorized tax professional. Premier Alliance does not provide legal advice or legal representation.