IRS REPRESENTATION – CLIENT CHECKLIST

Please bring the following documents.

Identification & Authorization

☐ Government-issued ID

☐ SSN or EIN

☐ Completed IRS Form 2848 (Power of Attorney)

☐ Completed Form 8821 (if needed)

☐ Current contact information

IRS Notices & Correspondence

☐ Original IRS notices

☐ Prior letters/notices

☐ Envelopes (dates)

☐ IRS transcripts (if obtained)

Tax Returns

☐ Prior 3–6 years of filed returns

☐ Unfiled returns or drafts

☐ Copies of amended returns

☐ Business returns (if applicable)

Income Documentation

☐ W-2s

☐ 1099s (NEC, MISC, K, INT, DIV, G, R)

☐ K-1s

☐ Self-employment logs/bookkeeping/bank statements

☐ Rental income records

Expense Documentation

☐ Receipts for major expenses

☐ Business expense documentation

☐ Mileage logs

☐ Home office records

☐ Medical expenses

☐ Charitable contributions

☐ Education expenses

Financial Information for Payment Plans / Hardship Requests

☐ Monthly household budget

☐ Most recent pay stubs

☐ Last 3–6 months of bank statements

☐ Mortgage/rent

☐ Utility bills

☐ Loan statements

☐ Credit card statements

☐ Proof of assets

Business Clients (if applicable)

☐ Payroll reports

☐ Sales tax filings

☐ Bookkeeping files

☐ General Ledger

☐ Asset lists & depreciation schedules

State Tax Documents

☐ State notices or letters

☐ State transcript/online account summary

☐ Past state tax returns

☐ Proof of payments or garnishments

Prior Resolution Attempts

☐ Notes from conversations

☐ Copies of agreements attempted

☐ Case IDs or agent names

☐ Installment agreement paperwork

☐ Offer in Compromise results/denials

Additional Information (if relevant)

☐ Divorce decree or separation

☐ Innocent spouse claim documents

☐ Identity theft letters or IRS PIN

☐ Bankruptcy documents

☐ Wage garnishment or bank levy notices