

Your Name: \_\_\_\_\_ Date: \_\_\_\_\_

***NOTE: Please answer as many of these questions as you can. We will not be able to represent you effectively if there are documents or data in your possession which you do not disclose to us before we begin.***

1. \_\_\_ Bring the ENTIRE IRS AUDIT NOTICE, so that we may make a photocopy.
2. \_\_\_ Bring a copy of the tax return being audited.
3. \_\_\_ Bring a copy of the tax return for the years PRIOR to and AFTER the year being audited.
4. \_\_\_ If either the prior or subsequent years' tax returns aren't available, why not?
5. \_\_\_ If you filed city business license, sales or payroll tax returns, bring them and all documentation.
6. \_\_\_ If you did not prepare these returns yourself, provide the contact information for the preparer.
7. \_\_\_ Why are you not having the preparer represent you in the audit?
8. \_\_\_ If you know of mistakes in the return, please provide full details.
9. \_\_\_ If you know of income you did not declare, please provide full details.
10. \_\_\_ If you deposited money into your accounts which was not income, please explain why.
11. \_\_\_ If you have been audited for any of the past 3 years' tax returns, bring all the records.
12. \_\_\_ Bring all W-2s, 1099s, 1098s, K-1 forms, Stockbroker Reports, Donation receipts or letters, and other similar tax documents which were generated by others.
13. \_\_\_ If you kept any of your financial records in a computerized accounting system, such as Quicken or Quickbooks, bring a backup copy of the file. Use the "backup" command in the FILE menu.
14. \_\_\_ If you have an accounting system which is not WINDOWS compatible, print out the ITEMIZED CATEGORIES report (Quicken) or the DETAIL GENERAL LEDGER (Quickbooks) for the tax year.
15. \_\_\_ Bring the bank statements and canceled checks for the entire tax year—as well as for January of the following year. For all bank accounts.
16. \_\_\_ If any of your expenses were on credit card, bring the credit card statements, as well as any receipts you might have kept.
17. \_\_\_ If any of your expenses were in CASH, bring the receipts.
18. \_\_\_ Bring the merchant receipts for all of your deductions, whether paid for with check or credit card.
19. \_\_\_ If you kept track of some expenses in your CALENDAR BOOK (such as mileage, parking, tolls, meals, entertainment, etc.) bring the year's calendar book.
20. \_\_\_ If you had any meals or entertainment expense, bring the record which documents the expense: how much, whom you ate with or entertained, and what you discussed.
21. \_\_\_ If you had automobile expenses, bring the record which shows how many business miles you drove. This could be a mileage book, a calendar or a computerized calendar record printout. We'll need to know how many business miles were driven in any vehicle you also used personally.
22. \_\_\_ Bring all repair and oil change records for the tax year for each vehicle you drove.
23. \_\_\_ If you deducted a home office, bring a map of your residence, with each room identified with square footage noted, with the business portion marked. The business use test is "regular and exclusive."
24. \_\_\_ If home office, provide your rent and utility receipts.
25. \_\_\_ If you have computers which have mixed business and personal use, show how you kept track of business vs. personal use.
26. \_\_\_ If you deducted personal telephone use, provide the phone bills, and mark them so the personal use is differentiated from the business use.
27. \_\_\_ If you deducted anything else, bring appropriate documentation.