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TAXES AND IRS

IRS Notice Response Checklist

Received an IRS letter? Use this checklist to organize the issue and prepare for a timely review. The notice itself controls what action is needed and when.

1 Read and prioritize

- ☐ Keep every page of the notice and its envelope. Identify the notice number, tax year, date, amount and response deadline.
- ☐ Read the requested action. Compare the notice with your filed return and payment records before deciding whether you agree.
- ☐ Treat a levy warning, notice of deficiency, appeal deadline or court deadline as urgent. Seek qualified help promptly; a consultation request does not extend a deadline.

2 Prepare your records

- ☐ Gather the relevant filed return, income documents, payment confirmations and prior IRS correspondence in a secure folder.
- ☐ If the notice appears unfamiliar, verify it through [IRS.gov](https://www.irs.gov) or your IRS Online Account before sharing information or making a payment.
- ☐ Summarize the discrepancy and list questions for your reviewer. Keep original records; share copies through an approved secure channel.

3 Respond and follow through

- ☐ Follow the notice instructions for the response method and destination. Include the supporting records requested if you disagree.
- ☐ Keep a copy of the response and proof of mailing or submission. Track follow-up dates and any additional IRS requests.
- ☐ If you owe and cannot pay in full, ask about available payment options. Filing, payment and appeal obligations may have separate deadlines.

Protect your information: do not enter SSNs, tax IDs, account numbers or tax documents in this PDF or a general contact form. New tax clients use TaxesToGo; existing clients use Customer Portal, as directed by Urban AZ.

Get help understanding your notice

Urban AZ Financial can review the notice, clarify priorities and discuss the next step for your situation.

[Request an IRS Notice / Levy Review >](#)

Sources • Reviewed October 10, 2026: [IRS notice guidance](#)

General education, not individualized tax or legal advice. Representation requires appropriate authorization. No tax or resolution outcome is guaranteed.