

Missing Tax Documents Action List

Track every missing record by source, purpose, request date, secure delivery method, owner, due date, substitute evidence, and resolution.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

01 Missing-item register

02 Source and request method

03 Deadline and owner

04 Substitute evidence

05 Resolution and final review

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Missing Tax Documents Action List

Record what is known, identify the source, assign an owner, and make missing information visible.

Missing-item register

Purpose / facts / owner / evidence / date:

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Source and request method

Purpose / facts / owner / evidence / date:

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Deadline and owner

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Substitute evidence

Purpose / facts / owner / evidence / date:

Resolution and final review

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Missing Tax Documents Action List

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