

# Tax Authorization Preparation Checklist

Prepare taxpayer identity, periods, forms, representative details, authority scope, delivery, revocation, and recordkeeping questions for approved authorization forms.

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

## What this free resource includes

- 01 Taxpayer and representative
- 02 Tax forms and periods
- 03 Scope of authority
- 04 Execution and delivery
- 05 Revocation and records

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 Tax Authorization Preparation Checklist

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

## Taxpayer and representative

Purpose / facts / owner / evidence / date:

## Tax forms and periods

Purpose / facts / owner / evidence / date:

## Scope of authority

Purpose / facts / owner / evidence / date:

## Finish the record and confirm the next step

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

### Execution and delivery

Purpose / facts / owner / evidence / date:

### Revocation and records

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](mailto:sales@ezypz.com) and mention: Tax Authorization Preparation Checklist

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