

# TIPS TO SHORTEN YOUR AUDIT

You can shorten your audit process if you take time before your appointment to review the list of records needed and to organize your records.

## ◆ What if someone else prepared my return?

*If you had someone else prepare your return, you may wish to contact your tax preparer for any notes or workpapers used.*

## ◆ What records do I need to bring?

*Please look on the list attached to your letter to see which items on your tax return are being audited, and which records we suggest you bring with you. Also bring any workpapers or notes used in preparing your return.*

## ◆ How should I organize my records?

*Review your records for each item being audited as shown on the list attached to your letter. Pull out the specific records needed to match the dollar amount shown on the tax return. Summarize and group your cancelled checks, receipts, and invoices by item being audited. Some examples follow which may or may not apply to your case.*

### Example 1

Your advertising expense is being audited and your return shows that your expenses for the year were \$899.00. Your summary would show the following:

Newspaper Ad	\$ 46.00
Yellow Pages	600.00
Print Shop	82.00
Regional Directory	171.00
<b>Total Deductions</b>	<b>\$ 899.00</b>

*Please bring cancelled checks and receipts to show that each of these amounts were paid during the year.*

### Example 2

Your charitable contribution expense is being audited and your return shows that your expenses for the year were \$3,630.00. Your summary would show the following:

Salvation Army (non-cash)	\$ 200.00
Religion Church	3,000.00
State University	430.00
<b>Total Deductions</b>	<b>\$ 3,630.00</b>

*Please provide receipts for non-cash contributions and the required cancelled checks for all items and written statement from the charitable organization for one-time contributions of \$250.00 or more.*



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