State Tax Return Preparation Checklist

- ☐ E-mail/fax signed engagement letter and order form to Ira Smilovitz.
- ☐ Send payment to Ira Smilovitz.
- ☐ Receive notice from Ira Smilovitz that secure portal has been established for exchange of confidential data.
- ☐ Retrieve supplemental questionnaire from secure portal.
- ☐ Upload federal 1065 and completed supplemental questionnaire to secure portal.
- ☐ Receive notice from Ira Smilovitz that completed state return is in the secure portal.
- ☐ Retrieve completed state return from secure portal.
- ☐ Review completed return for accuracy (In particular, look for typos in name, address, SSNs, etc.). Notify Ira Smilovitz if any errors are found.

If Ira Smilovitz is e-filing club's state return:

- ☐ Sign e-file authorization and return it to him via secure portal or fax.
- ☐ Receive notice from Ira Smilovitz that state e-filing confirmation is in the secure portal.
- ☐ Retrieve state e-filing confirmation from secure portal and attach to club's copy of state return.

If club is filing its state return on paper:

- ☐ Sign state return and file with appropriate state tax authority.

When state return is filed (whether electronically or on paper):

- ☐ Distribute state "K-1"s to members (if appropriate for your state)