

## 2023 State Tax Return Preparation Checklist

- E-mail/fax signed engagement letter and order form to Glenwood Tax Services.
- Send payment to Glenwood Tax Services.
- Receive notice from Glenwood Tax Services that secure portal has been established at [smilovitz.securefilepro.com](https://smilovitz.securefilepro.com) for the exchange of confidential data. If you are a returning customer, your portal has already been created and you can use the same UserID and password as last year.
- Retrieve supplemental questionnaire from secure portal.
- Upload federal 1065 ([clubID]-federal-2023.pdf) and completed supplemental questionnaire to secure portal.
- Receive notice from Glenwood Tax Services 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 Glenwood Tax Services if any errors are found.

If Glenwood Tax Services is e-filing club's state return:

- Sign e-file authorization and return it to Glenwood Tax Services via secure portal or fax.
- Receive notice from Glenwood Tax Services 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)