

Tax Document Retention Guidelines

There are a few important guidelines when it comes to complete and correct tax return document retention. These guidelines are set by the IRS in addition to our office to be in IRS compliance as a tax preparer. Please follow your tax file checklist and this guide about tax document retention. Listed below are some important things to know about tax document retention:

- All tax files must be kept for a minimum of three years.
- These files must be kept in a safe and secure place.
- Any document that is used to prepare a tax return needs to be kept in a taxpayer file. These may include income documents, due diligence interviews, taxpayer information worksheets, and other supplemental materials.
- All signed documents need to have the original in the file. If the taxpayer requests, you can provide a copy.