



Tax Amendment Document Checklist

Before we can begin your amendment, please gather and upload the following documents.

Providing accurate and complete information will help us correct your return quickly and accurately.

- ☐ Copy of your originally filed tax return (Form 1040 and any schedules)
- ☐ Corrected or updated W-2s, 1099s, or other income documents
- ☐ IRS notice or letter (CP2000, CP12, etc.), if received
- ☐ New or updated dependent information (SSN, birth certificate if required)
- ☐ Documentation for any missed deductions or credits (e.g., childcare expenses, education statements)
- ☐ State tax return copy (if state amendment is required)
- ☐ Valid government-issued ID (for identity verification)
- ☐ Any additional documents that support the correction

Need help? Contact WealthCrest Financial at support@wealthcrest-financial.com