



IRS Freeze & Compliance Document Checklist

To help us resolve your IRS issue quickly and effectively, please gather and upload the following documents:

- ☐ Copy of IRS letter (CP05, CP75, 5071C, 4883C, LT16, etc.)
- ☐ Prior year's tax return
- ☐ ID Verification (Driver's License, Social Security Card)
- ☐ Proof of income (W-2, 1099, self-employment)
- ☐ Address verification (utility bill, lease, etc. if flagged)
- ☐ Any documents IRS has requested
- ☐ IRS transcript (if available - we can help pull this)

For questions or help uploading, contact WealthCrest Financial at support@wealthcrest-financial.com