MULTISTATE PREPARATION / 01

SEPARATE THE JURISDICTION QUESTIONS

Use A and B or state names. A possible jurisdiction is a question for the preparer, not a filing decision.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Tax year / broad engagement goal / preparer contact role

Jurisdiction A: question raised / high-level context / private-record reference

Jurisdiction A: preparer's requested clarification / owner / status

Jurisdiction B: question raised / high-level context / private-record reference

Jurisdiction B: preparer's requested clarification / owner / status

Confirmed engagement reference for A / for B / work still awaiting assessment

Preparation only. Not tax or legal advice, residency or filing determination, form selection, calculation, authorization or filing confirmation. Keep private records and amounts out.

MULTISTATE PREPARATION / 02

TRACK WHAT THE PREPARER IS WAITING ON

Record only dependencies identified by the professional. Do not transfer tax figures between returns.

Dependency 1: preparer request reference / jurisdiction waiting / record source role

Dependency 1: owner / secure handoff status / preparer's next review question

Dependency 2: preparer request reference / jurisdiction waiting / record source role

Dependency 2: owner / secure handoff status / preparer's next review question

Jurisdiction A: confirmed package scope / draft version / review handoff reference

Jurisdiction B: confirmed package scope / draft version / review handoff reference

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MULTISTATE PREPARATION / 03

KEEP EACH HANDOFF IDENTIFIABLE

Tick what is clarified. A received draft or copy is not authorization, filing or agency acceptance.

- [ ] Possible jurisdictions are separated from confirmed engagement scope
- [ ] Questions use high-level context without detailed private chronology
- [ ] Records are referenced rather than copied into this workbook
- [ ] Cross-jurisdiction dependencies come from the preparer
- [ ] Each requested item has an owner and secure sharing plan
- [ ] Each jurisdiction has its own draft-package version reference
- [ ] Review, authorization, delivery and filing-status questions stay separate
- [ ] Original returns and confirmations will be kept in secure records

Review or authorization question: jurisdiction / version / professional contact role

Copy received: jurisdiction / package reference / status record still requested

Unresolved dependency or missing package / owner / next checkpoint

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MULTISTATE PREPARATION / 04

QUESTIONS FOR THE MULTISTATE PREPARER

Ask how the engagement will be coordinated. Leave substantive tax determinations to the professional.

Assessment: how will you review jurisdictions and confirm the engagement?

Records: what tailored information is needed for each question, and how is it shared?

Dependencies: how do you identify information needed from another state or pro?

Ownership: who resolves open questions and reports that a record is ready?

Versions: how are each jurisdiction's draft, review and authorization identified?

Handoff: which copies and status records are provided, and who follows up?

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MULTISTATE PREPARATION / 05

COMPARE ONE COORDINATION SCOPE

Use Preparer A and B. Compare the same high-level questions without sharing private records here.

Preparer A / B / proposal dates / shared tax-year and question-list reference

Jurisdictions to assess, confirmed work and professional responsibilities - A / B

Secure record requests, dependency tracking and separate package handoffs - A / B

Written fee terms, timing, exclusions, later support and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai if you choose, then start a Tax Preparation request for multistate coordination. Share only broad jurisdiction questions and record readiness so participating pros can compete with proposals. Compare professional fit, scope, secure exchange, handoffs, timing and written terms.

One request. Every pro's best offer.

Start a request

Participation varies. A private consultation and jurisdiction-specific record review may be needed before engagement.

Planning guide: https://www.pickyourpro.ai/services/tax-preparation/multistate-preparation

IRS: state government website directory (official reference)

California FTB: part-year and nonresident overview (official reference)

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