handled
TAX & ADVISORY

BEYOND THE SEASON.

Handled Protection

A closer watch on your IRS account. A clearer view of the road ahead.

Included in every Handled membership. TaxRock monitors available IRS records. I help you understand what needs attention.

How it works

01 Authorize

Sign Form 8821 for the IRS information we agree to access.

02 Connect

Once access is active, TaxRock retrieves the IRS records available.

03 Monitor

Recorded payments, balances, and notice-related changes are flagged for review.

04 Prepare

Available income records help me prefill and cross-check your return.

Why it helps

See where you stand

Review available filing history, balances, and credits.

Confirm posted activity

Check where a payment or refund was applied.

Find missing pieces

Use reported income records to spot forms worth following up on.

Have a better conversation

Bring IRS account history into questions about payments, notices, and next steps.

Wage and income transcripts can include reported W-2 wages, interest, dividends, retirement income, brokerage sales, and gambling winnings. Records can be incomplete early in tax season. Keep sending original forms, statements, and IRS letters.

Your view of the account

When enabled, TaxRock client access includes Rocky, its AI assistant for IRS-record questions. I confirm access during enrollment. Bring decisions and anything unclear to me.

Every membership includes Handled Protection. Scheduled planning meetings and other services depend on your membership. Explore memberships at handledtax.com/memberships/

Form 8821 permits access to specified tax information; it does not authorize IRS representation or signing your return. Monitoring depends on IRS data and does not prevent audits or replace notice deadlines. Tax preparation, additional planning, and representation depend on the services agreed.

Sources: TaxRock | IRS Form 8821 | IRS transcripts

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