

Financial Documents Submission Checklist

Date: **[Insert Date]**

To: **[Recipient's Name]**

From: **[Your Name]**

Subject: Submission Checklist for Financial Documents

Dear **[Recipient's Name]**,

Please find below the checklist of financial documents submitted for your review:

- 1. Tax Returns for the Last 3 Years
- 2. Bank Statements (Last 6 Months)
- 3. Income Statements
- 4. Balance Sheets
- 5. Proof of Income (e.g., pay stubs, contracts)
- 6. Investment Statements
- 7. Debt Statements (credit cards, loans)
- 8. Budget Plan (if applicable)

If there are any questions or if further information is required, please feel free to contact me.

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Contact Information]