

Annual Tax Preparation Checklist

Dear [Client's Name],

As we approach the tax season, it's essential to ensure that you have all the necessary documents and information ready for a smooth tax preparation process. Please find below a checklist to help you gather what you need:

Income Documents

- W-2 Forms from employers
- 1099 Forms for any freelance or contract work
- Investment income statements (1099-DIV, 1099-INT)
- Other income sources documentation

Deductions and Credits

- Receipts for deductible expenses (medical, charitable donations, etc.)
- Form 1098 for mortgage interest
- Educational expenses documentation (Form 1098-T)

Personal Information

- Social Security Numbers for all dependents
- Bank account information for direct deposit
- Copies of previous year's tax return

Please review this checklist and gather the necessary documents. Feel free to reach out if you have any questions or need assistance.

Sincerely,

[Your Name]

[Your Company]

[Contact Information]