

# Tax Audit Document Checklist for Individuals

Date: [Insert Date]

To: [Insert Auditor's Name]

From: [Insert Your Name]

Subject: Tax Audit Document Checklist

Dear [Insert Auditor's Name],

In preparation for the upcoming tax audit, please find below the checklist of documents that will be required:

## Personal Information

- Copy of government-issued ID
- Social Security Number (SSN) or Tax Identification Number (TIN)

## Income Documentation

- W-2 forms from employers
- 1099 forms for freelance work
- Bank statements showing interest income

## Expense Documentation

- Receipts for deductible expenses
- Records of medical expenses
- Charitable donation receipts

## Investment Documentation

- Brokerage account statements
- Statements of sales of stocks and bonds

## Miscellaneous

- Previous year's tax return
- Any correspondence with the IRS

Please ensure that all documents are organized and submitted by [Insert Submission Deadline].  
Should you have any questions or require further information, feel free to contact me.

Thank you for your attention to this matter.

Sincerely,

[Insert Your Name]

[Insert Your Contact Information]