

# Tax Compliance Checklist

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Your Email]

[Your Phone Number]

To Whom It May Concern,

Subject: Tax Compliance Checklist for [Year]

Enclosed is a checklist to ensure that all necessary documents and forms are in order for the upcoming tax season. Please review the following items:

- Income Statements (W-2s, 1099s)
- Deductions and Credits Documentation
- Charitable Contributions Receipts
- Mortgage Interest Statement
- Health Insurance Information
- Business Expenses (if self-employed)

Please confirm that all items are prepared and submit them by [Insert Deadline]. Should you have any questions or require further assistance, do not hesitate to reach out.

Thank you for your attention to this matter.

Sincerely,

[Your Name]