

Tax Audit Preparation Checklist for Self-Employed Professionals

Date: _____

To: [Tax Professional's Name]

From: [Your Name]

Subject: Tax Audit Preparation Checklist

Introduction

Dear [Tax Professional's Name],

As we prepare for the upcoming tax audit, I have compiled a checklist of necessary documents and information needed to streamline the process. Below is the preliminary checklist for your review.

Checklist Items

- Personal identification (Social Security number, driver's license)
- Business financial statements (income statement, balance sheet)
- Bank statements for the audit period
- Invoices and receipts for all business expenses
- Records of income received (1099s, sales receipts)
- Tax returns for the previous three years
- Documentation of any deductions claimed
- Schedule of assets and liabilities
- Correspondence with the IRS or tax authorities
- Any prior audit findings or adjustments

Next Steps

Please review this checklist and let me know if any additional documents or information are required. I look forward to your guidance on the next steps as we prepare for the audit.

Thank You

Thank you for your assistance.

Best regards,

[Your Name]

[Your Contact Information]