

# End-of-Year Tax Follow-Up

Dear [Client's Name],

As we approach the end of the year, I wanted to take this opportunity to follow up with you regarding your tax preparation needs. It's important to me that you are well-prepared for the upcoming tax season, and I am here to assist you every step of the way.

During this time, I recommend reviewing your financial documents and gathering any relevant information needed for your tax return. This may include:

- W-2 and 1099 forms
- Bank statements
- Investment income statements
- Receipts for deductions

If you have experienced any significant life changes this year, such as marriage, the birth of a child, or changes in income, please let me know, as these can affect your tax situation.

Feel free to reach out to me at [Your Phone Number] or [Your Email Address] if you have any questions or want to set up a time to discuss your tax preparation. I am here to help!

Thank you for entrusting me with your tax preparation needs. I look forward to working with you again.

Best regards,

[Your Name]

[Your Company Name]

[Your Address]

[Your Phone Number]

[Your Email Address]