

Annual Tax Compliance Checklist

Date: [Insert Date]

To: [Insert Recipient Name]

Address: [Insert Recipient Address]

Dear [Insert Recipient Name],

Please find below the annual tax compliance checklist to ensure that all necessary documentation and submissions are completed:

Annual Tax Compliance Checklist

- Verify income statements (W-2, 1099 forms)
- Gather all receipts and records of expenses
- Review deductions and credits
- Ensure retirement contributions are reported
- Confirm tax filing deadlines
- Check whether estimated tax payments are made
- Collect prior year tax returns for reference
- Consult with a tax professional if needed

Please ensure that all items are addressed by [Insert Deadline Date]. If you have any questions, feel free to reach out.

Thank you,

[Your Name]

[Your Position]

[Your Company]