

Proactive Tax Documentation Review

Date: [Insert Date]

To: [Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

As we approach the upcoming tax season, we want to take a proactive approach to ensure that all your tax documentation is in order. This will help minimize any potential issues and streamline the filing process.

Please take a moment to review the following checklist of documents needed:

- W-2 Forms from all employers
- 1099 Forms for freelance work or interest income
- Receipts for deductible expenses
- Records of any estimated tax payments made
- Documentation for any charitable contributions

If you have any questions or if there are additional documents you believe may be relevant, please do not hesitate to reach out. We are here to assist you in this process.

Thank you for your attention to these matters. We look forward to working with you and ensuring a successful tax filing season.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]