

Client Tax Filing Requirements Checklist

Dear [Client Name],

As we prepare for your upcoming tax filing, please review the following checklist to ensure you have all necessary documentation ready:

Personal Information

- Social Security Numbers for you and your dependents
- Copy of last year's tax return

Income Documents

- W-2 forms from all employers
- 1099 forms for any freelance or contract work
- Income statements from investments or rental properties

Deductions and Credits

- Receipts for deductible expenses (medical, charitable donations, etc.)
- Form 1098 for mortgage interest
- Statements for educational expenses (Form 1098-T)

Business Information (if applicable)

- Profit and loss statement for the business
- Business receipts and expenses

Please gather these documents at your earliest convenience. If you have any questions or need assistance, do not hesitate to reach out.

Best regards,

[Your Name]

[Your Company]

[Your Contact Information]