

# Comprehensive Tax Preparation Document List

Dear [Client's Name],

In order to ensure a smooth and efficient tax preparation process, please provide the following documents:

- Personal Information:
  - Social Security Numbers for you and any dependents
  - Copy of last year's tax return
- Income Documentation:
  - W-2 forms from all employers
  - 1099 forms for any freelance or contract work
  - Bank statements showing interest income
  - Any other income documentation (rental income, dividends, etc.)
- Deductions and Credits:
  - Documentation for mortgage interest paid
  - Property tax statements
  - Charitable donation receipts
  - Medical expenses receipts
  - Education expenses (Form 1098-T)
- Investment Information:
  - Brokerage statements
  - Details of any stock sales
- Business Income and Expenses (if applicable):
  - Profit and loss statements
  - Receipts for business-related expenses

Please gather these documents and send them to us as soon as possible. If you have any questions or need assistance, feel free to contact us.

Thank you for your cooperation.

Sincerely,  
[Your Name]  
[Your Company Name]  
[Contact Information]