

Annual Tax Preparation Documents Request

Date: [Insert Date]

To: [Client's Name]

[Client's Address]

Dear [Client's Name],

As we approach the tax season, we would like to ensure that your annual tax return is prepared accurately and on time. To facilitate this process, please provide the following documents:

- W-2 forms from all employers
- 1099 forms for any freelance or contract work
- Receipts for deductible expenses
- Bank statements for interest income
- Investment statements (1099-DIV, 1099-INT)
- Last year's tax return
- Any other relevant financial documents

Please submit these documents by [Insert Deadline Date] to ensure timely processing. You may send them via email or drop them off at our office.

If you have any questions, feel free to reach out. Thank you for your cooperation!

Sincerely,

[Your Name]

[Your Position]

[Your Company Name]

[Your Contact Information]