

Items Needed for Tax Returns

Date: [Insert Date]

To: [Insert Recipient Name]

From: [Your Name]

Subject: Items Required for Tax Returns

Dear [Recipient Name],

As we prepare for the upcoming tax filing season, please gather the following items needed for your tax returns:

- W-2 Forms from all employers
- 1099 Forms for additional income
- Receipts for deductible expenses
- Bank and investment statements
- Health insurance documentation (Form 1095-A, B, or C)
- Records of any property sales or purchases
- Mortgage interest statements
- Charity donation receipts
- Pension and retirement account statements
- Previous year's tax returns

Please ensure all documents are collected by [Insert Deadline] to facilitate a smooth filing process.

Thank you for your cooperation.

Sincerely,

[Your Name]

[Your Contact Information]