

Tax Filing Documentation Checklist

Date: [Insert Date]

To: [Insert Recipient's Name]

From: [Your Name]

Subject: Tax Filing Documentation Checklist

Dear [Recipient's Name],

As part of the preparation for your tax filing, please find below a checklist of necessary documents:

- W-2 Forms from all employers
- 1099 Forms for freelance or investment income
- Receipts for deductible expenses
- Bank statements
- Investment income statements
- Mortgage interest statements
- Charitable donation receipts
- Health care documents (Form 1095-A, B, or C)
- Previous year's tax return

Please ensure that you gather these documents and have them ready for the tax filing process. If you have any questions or need further assistance, feel free to reach out.

Sincerely,

[Your Name]

[Your Contact Information]