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## Deadline and Delivery Dates Email Template

**Subject:** Important: Information Needed for Your Upcoming Tax Filings

Hello **[client name]**,

As we prepare for the upcoming filing season, I wanted to ensure everything runs smoothly for your federal and state returns. To help us stay on schedule, please review the list below and provide the requested information by the indicated dates.

Information Needed	Examples	Due Date
Year-end financial statements	Federal income statement, balance sheet, and trial balance	<b>[Date]</b>
Payroll records	W-2s, 941s, 940s, and state unemployment forms	<b>[Date]</b>
Vendor information	W-9s for new vendors and confirmation of existing vendor details	<b>[Date]</b>
1099 data	Finalized 1099 information, including any corrections	<b>[Date]</b>
State-specific documentation	Any additional reports or filings required by your state(s)	<b>[Date]</b>

If you anticipate any delays in gathering or submitting these materials, please let me know as soon as possible so that we may adjust our timeline accordingly.

Thank you for your time and assistance. Preparing now makes for a smooth filing process in January.

Best regards,

**[Your Name]**

**[Your Firm Name]**

**[Your Contact Information]**