

Date: [Current Date]

To: [Property Manager Name / Bookkeeper Name / Partner Name]

From: [Your Name/Company Name]

Subject: Annual Expense Documentation for Tax Filing - [Tax Year]

Dear [Recipient Name],

As we prepare for the upcoming tax season, I am requesting all financial records and expense documentation related to the following property/properties for the [Tax Year] calendar year:

- [Property Address 1]
- [Property Address 2]

Please provide the following documents by [Due Date]:

- Annual Profit and Loss Statement
- Categorized list of all repairs and maintenance costs
- Copies of receipts for all capital improvements
- Property management fee statements
- Mortgage interest statements (Form 1098)
- Property tax payment confirmations
- Utility bills (if paid by the owner)
- Insurance premium receipts

Digital copies in PDF or CSV format are preferred. Please upload these files to [Link/Folder] or reply directly to this email with the attachments.

Thank you for your assistance in ensuring our tax filings are accurate and submitted on time.

Best regards,

[Your Signature]

[Your Phone Number]

[Your Email Address]