

# Tax Document Request Form (Individuals)

This **tax document request form** sample for individuals simplifies the process of obtaining necessary tax records from employers or financial institutions. It ensures accuracy and compliance by clearly specifying the required documents and personal information. Using this form helps streamline tax preparation and filing, reducing delays and errors.

Personal Information

Full Name:

Date of Birth:

Social Security Number (last 4 digits):

Mailing Address:

Phone Number:

Email Address:

Requested Documents

☐ W-2 (Wage and Tax Statement)

☐ 1099 (Miscellaneous Income)

☐ 1099-INT (Interest Income)

☐ 1099-DIV (Dividend Income)

☐ Other (please specify):

Authorization & Signature

I hereby authorize the release of the requested tax documents to the contact information provided above. I affirm that the information provided is accurate to the best of my knowledge.

Signature:

Date:

Submit Request