

IMPORTANT INFORMATION. PLEASE READ AND SIGN YOUR TAX ORGANIZER FOLLOWING THIS SECTION.

- **NEW CLIENTS.** Please *BE SURE TO COMPLETE* the General Information and Dependent Information Sections of this organizer. Also, be sure to read carefully the following points. You can help us process your work more efficiently by understanding our procedures.
- **CURRENT CLIENTS.** Please *BE SURE TO REVIEW AND UPDATE* your personal and contact information, making any changes necessary.
- **RESPONSIBILITY.** First and foremost, ***remember that YOU are responsible*** for keeping necessary records of your income and deductions, and YOU have the final responsibility for the content of your tax returns. Our responsibility, as for all CPAs, lies in our skill to use your information to your best benefit.
- **APPOINTMENTS. WE CANNOT MEET WITHOUT SCHEDULING APPOINTMENTS.** We will make every effort to arrange a convenient time for you. HOURS: Monday through Friday, 9:00 AM to 12:15 PM and 1:45 PM to 6:00 PM (lunch 12:15 pm to 1:45 pm).
- **MAIL OR DELIVER YOUR ORGANIZER TO OUR OFFICES.** Many times, appointments are unnecessary if you complete and mail, email, or deliver your organizer to us. We will contact you with any questions. If you SCAN and email your organizer and documents, please scan only one document per page.
- **WE WILL NOT RETURN DOCUMENTS UNLESS YOU REQUEST US TO.** In an effort to hold down costs, we will not return the documents you provide unless you request us to. Please retain copies of all documents you send us.
- **ITEMIZED DEDUCTIONS.**
HEALTH INSURANCE PREMIUMS: "Pre-tax" amounts are not deductible.
If you have included payments for health insurance premiums, DO NOT list any "pre-tax" amounts.
AD VALOREM TAXES: DO NOT include the cost of tags.
PERSONAL PROPERTY TAXES: Remember to INCLUDE tax paid on a boat or plane.
- **RECEIPT TOTALS.** Please provide us with income and expense "**TOTALS.**"
Please DO NOT BRING US ENVELOPES OF LOOSE, UNTOTALED RECEIPTS.
- **RECEIPTS.** Save all receipts for tax purposes such as audits.
Examples: Sales tax on car; Medical payments; Home remodeling. Email us if you are unsure.
- **REQUESTS FOR ADDITIONAL INFORMATION.** We may request copies of information to document justification of positions in your favor. We will not audit nor otherwise verify data that you submit, but we may ask that you clarify some items to enable us to fully understand your tax position and to properly prepare your returns.
- **ERRORS.** In the rare instance in which our work contains an error, we reserve the right to amend or correct your return at no charge for our time. Please inform us immediately of any such errors.
- **AUDITS.** All tax returns are subject to review by the taxing authorities. Should your return be selected for audit, please advise us immediately so that we may discuss with you the best method under which to proceed.
- **CONTACTING US.** At times during tax season we are not available to answer your call. However, you may contact us in a variety of ways. If possible, we prefer you **E-MAIL** us at ***IRSGOAWAY@AOL.COM***. If not possible, FAX your message to 770-461-8535, or leave a message or question on our voice mail so we can be prepared when we return your call.

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- ↪ **TURNAROUND.** Your tax return is customized for you. We take the time necessary to ensure that we have kept your income taxes to the absolute minimum. If you require quick turnaround, please advise us when you schedule your appointment or when you send us your completed tax checklist. "Final" information received from you after March 1 will most likely ensure completion will be after April 15. We will prepare an extension.
- ↪ **EXTENSIONS.** We will make every effort to have your tax return prepared before **April 15**. However, if we have not received all necessary information from you **BY MARCH 1**, we will prepare, and possibly file an extension for you. *An extension neither increases nor decreases your chance of an audit.* We will estimate how much tax payment, if any, is to be sent with your extension.
- ↪ **AFTER MARCH 1.** As a precaution we will prepare extensions for all tax returns, regardless of whether or not they will be used. Please make every effort to send us your work more than five weeks prior to the end of the season.
- ↪ **MORTGAGE FINANCING & REFINANCING / FASFA / HOPE SCHOLARSHIP.** If your mortgage company will need financial information or tax returns prepared by us, or if you need tax returns for FASFA or the Hope Scholarship, *Please provide at least seven days notice, and preferably longer, before the date the requested information is needed.*
- ↪ **SERVICES WE OFFER IN ADDITION TO TAX PREPARATION.** Throughout the year we are available for consultation regarding your questions on specific tax matters or assistance in tax and business planning. However, we will not offer recommendations as to investment quality of any specific stock, bond, limited partnership or similar investment.
- ↪ **FEE.** Fees for tax preparation and for all other related services are based on time spent at our hourly standard rates. Tax preparation: generally, \$95 per hour. Other: \$65 - \$125 per hour. Review of "client-prepared" tax return: minimum \$150. Estimated MINIMUM charge for the completion of both an individual's federal and state returns: \$190.00. Estimated AVERAGE charge for the completion of both an individual's federal and state returns: \$295.00. *Actual charges often vary from from these estimates, depending on the complexity of the returns.* Charge for additional copies of tax returns and support in divorce situations, for replacements, etc., is \$45 minimum. Either or both spouses or taxpayers may request. We accept MasterCard, Visa, American Express, and Discover Credit Cards for your convenience. At this time, WE DO NOT ACCEPT DEBIT CARDS.
- ↪ **TO KEEP YOUR COST OF TAX PREPARATION TO A MINIMUM:** PLEASE INCLUDE ALL PERTINENT TAX DATA WITH YOUR CHECKLIST or note that information will follow. We will charge to redo completed returns for data received late.
- ↪ **ALSO, WE WILL DELIVER YOUR TAX RETURN IN PDF FORMAT VIA EMAIL.** If you require a paper copy, please contact us.
- ↪ **INVOICING & PAYMENT.** In 2006, we began invoicing clients via e-mail as well as accepting payments on-line. We would appreciate your participation. Please make sure you check the appropriate response on the following page regarding invoice via e-mail.
- ↪ **BILLING OF COMPLETED WORK.** In general, a service charge of 1.5% per month will be added to all accounts not paid currently.
- ↪ **PRIVACY POLICY.** All non-public information about our clients is restricted to those members of our staff who need to know such information in order to provide the services you requested. We will not sell your name to any other firm. From time to time we may provide your name to firms we work with to inform you of financial information that could benefit you.