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January 2012

To: name of new cleint/s,

Thank you for allowing me the opportunity to assist you with preparing your 2011 Income Tax Returns. I have enclosed, for your convenience, a generic income tax organizer. Please use it as a helpful guideline to assemble the documentation and information I will need to prepare your returns. It is also helpful to use last year's return as an additional guide. Please bring last year's returns with you for our tax preparation interview. It has a lot of information that will assist me in preparing your 2011 returns. Call if you have questions while assembling your information so that we will accomplish as much as possible during the tax preparation interview.

I encourage you to make an appointment as early as possible even if you do not have all of your information completed yet. This allows me additional time to review your situation and make sure that we are claiming all of the tax deductions that you are entitled. Bring in as much original documentation as possible so I can make copies to keep on file if we need to verify information at a later time. During your appointment we can discuss recent tax law changes that may be beneficial in lowering your taxes in 2012.

On the back is an Engagement Letter that explains our agreement for preparing your 2011 income tax returns. It basically states that I will prepare your returns based on the information you provide to me, that you will check the completed returns to verify that all of your income and deductions for 2011 are reported and to the best of your knowledge it is accurate and complete. Please bring the signed engagement letter with you to your appointment.

I am looking forward to working with you this year. Call if you have any questions. Also we will be happy to provide you a copy of our Privacy Policy upon request.

Sincerely,

Paul T Matonis, EA, ABA

*Enrolled Agent - federally licensed to practice before the Internal Revenue Service
Accredited business Accountant - specializing in the needs of small businesses*