

# Gould, Stinson & Comer, PC

269-372-0001

Dear Client:

**Organizer:** The Organizer is one of our main tax tools. Your help in filling it out will minimize the potential for missed items and may help you find other deductions and minimize your fee. If the organizer overwhelms you, or you have received a shortened version, **at a minimum please fill in the questionnaire, review the personal info sheet, sign the Engagement Letter, and return it all to us with your tax information.**

**Questionnaire:** The Questionnaire identifies issues we may otherwise not find out about your tax situation--an answer could be a big tax-saver! As you may or may not know, *the final question on the questionnaire is always light hearted.* We pick our favorite answer at the end of tax season and award a \$50 gift certificate to the winner!

**We will also need the following information:**

- Separate blue sheet in organizer packet related to your health insurance coverage.
- **Forms 1095-A, B or C related to the Affordable Care Act (required).**
- W-2 forms, all 1099's (int, div, cap gains, etc.), K-1's (partnerships, S-Corps, trusts).
- Brokerage statements showing investment transactions for stocks, bonds, etc., and related cost of stocks and dates acquired.
- Supporting documents for mortgage interest, taxes, donations, etc.
- Copies of closing statements regarding the sale, purchase, or refinance of real property.
- Legal papers for adoption, divorce, separation and custody issues.
- Any tax notices sent to you by the IRS or other taxing authority.
- A copy of your income tax return from last year, if not prepared by this office.

**Engagement Letter:** This agreement is meant to solidify your understanding of what services our office will provide, what returns will be filed, how we determine fees, and so on. This agreement minimizes misunderstandings and lets you know what to expect from our office. **It must be reviewed, signed, dated and returned to our office with your tax information; please leave it attached to the organizer and return both together.** Copies of the Engagement Letter are available upon request with your completed return.

**Security:** In your client organizer, all social security numbers and bank account numbers have been replaced with asterisks (\*\*\*-\*\*-\*\*\*\*) and (\*\*\*\*1234) to protect your privacy and personal information. **If there are any changes to these confidential numbers, please note them on the organizer.** When you receive your completed tax returns, please review all social security numbers and bank account information for accuracy, in addition to your overall return. Report any discrepancies to our office immediately.

**Drop-offs and Mail-ins:** You may wish to drop off or mail in your return materials; we appreciate this approach. If you haven't received a prescheduled appointment but feel your current situation warrants one, please call our office in January to schedule one.

**Tax season office hours:** Mon-Thurs, 8:00 to 6:00; Fri 8:00 to 5:00; Sat. 9:00 to 1:00PM.

Thank you for the opportunity to serve you.

**Gould, Stinson & Comer, P.C.**