

Tucker & Company, P.C.
Certified Public Accountants
636 W. Republic Road, B-108
Springfield, MO 65807
www.TuckerCPAs.com
Fax (417) 881-6920
Phone (417) 881-6919

January, 2010

Dear Client,

The enclosed organizer has been designed to assist you in gathering information needed for us to prepare your income tax return. We hope it makes your task easier. Let us know if there are other ways we may assist you in your accounting or tax planning needs. We are a full service firm offering a wide array of tax and estate planning services as well as business accounting services.

Complete only those schedules that apply to you. Please be sure to answer the general questions in the front of the organizer, these questions help us determine if you qualify for new deductions in 2009 and assist you in obtaining the supporting documentation you need before filing your return. This year include your real property tax receipt and information on sales tax paid on new vehicle purchases if they apply to you. As you receive your 2009 tax documents, collect them and keep them with this organizer. These documents include such items as your W-2s, Forms 1099, K-1, brokerage statements, etc. A fully completed organizer lessens the likelihood of omissions from your tax return. If you are unsure where to record information, please use the page entitled "Additional Information".

Attached to the organizer is an engagement letter stating the terms for services to be performed. We will not start processing any return without a signed engagement letter; therefore, please read it fully, sign, date and return it with your organizer. New Internal Revenue Service regulations prohibit obtaining information from your tax return without your consent, so please review the consent portion of this organizer and sign after your review.

When you have gathered all your tax information, mail or drop off the tax organizer. You may also contact our office to set up an appointment if you feel it is necessary to go over new information, or if your deductions or income has changed significantly.

We always appreciate referrals of family, friends and business associates and we appreciate your continued business. We and look forward to hearing from you soon; feel free to contact us if you have any questions.

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Dear Client,

As the business world changes, so does the way we do business. Next year, we will email your tax organizer unless you indicate otherwise below. If you do not have an email address, we will continue to mail your organizer in the usual manner via US postal service.

If you do NOT want us to email your organizer and would prefer to have it mailed using the US postal service, please let us know.

_____ I would prefer my organizer be mailed to me using the U S Postal Service.

We value your business and we are always interested in your suggestions and ideas. If you have comments that would help us to serve you better, feel free to let us know on this organizer.

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CONSENT TO USE OF TAX RETURN INFORMATION

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

In efforts to fully serve our clients, from time to time, we provide them helpful information such as firm newsletters, surveys, published articles, press releases, information concerning firm seminars and nontax related services, and announcements related to firm personnel. To determine what items may be of interest to you, we will need to use your tax return information. If you agree to use of tax return information for this purpose, sign and date this consent form.

I, (please print) _____, authorize Tucker & Company, P.C. to use the information I provide to Tucker & Company, P.C. during the preparation of my tax return for 2009, including my entire return, concerning firm seminars and nontax-related services, and announcements related to firm personnel. I understand I have the right to limit the consent to specific information, not just authorize use of the entire return. Recognizing that right, I consent to the use of my entire tax return.

Signature: _____ **Date:** _____

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

Please retain a copy of this signed agreement for your files, a separate copy will also be provided with your tax return for your permanent records.

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Regarding Tax year 2009

Dear Client:

We appreciate the opportunity of working with you and advising you regarding your income tax. The Internal Revenue service imposes penalties upon taxpayers, and upon us as return preparers, for failure to observe due care in reporting for income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements:

We will prepare your 2009 federal and requested state income tax returns from information which you will furnish. We will make no audit or other verification of the data you submit, although we may need to ask you for clarification of some information. It is your responsibility to provide us with all the information required for the preparation of complete and accurate returns. You should retain all documents, canceled checks and other data that form the basis of income and deductions. It is your responsibility to review your returns carefully before you sign them.

You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that your expenses for meals, entertainment, travel, gifts, vehicle use and charitable contributions and other deductions and credits are supported by records as required by law.

Our work in the preparation of your income tax returns does not include any procedures designed to discover fraud, defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as we find necessary for preparation of the income tax returns.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or circumstances of these penalties, please contact us.

We will use our judgment in revolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretation of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. Your returns may be selected for examination by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. If an examination occurs, we will represent you if you so desire; however, these additional services are not included in our fee for preparation of your returns and we will render additional invoices for the time and expenses incurred. In the event you have an audit, we hope for an outcome of no tax change. It is our approach to minimize your tax. If on examination you are assessed additional taxes, interest or penalties, we will not be responsible for any amounts owed.

Our fee for these services will be based upon the amount of time required at our standard billing rates, plus out-of-pocket expenses. All invoices are due and payable upon presentation. A finance (service) charge of 1.5 percent per month will be assessed on any unpaid balance after deduction of current payment, credits, and allowances made within 30 days of the date of billing. This is an annual percentage rate of 18%.

In the event of a dispute related in any way to our services, our firm and you agree to discuss the dispute and, if necessary, promptly mediate in a good faith effort to resolve. We will agree on a mediator, but if we cannot, either of us may apply to a court having personal jurisdiction over the parties for appointment of a mediator. We will share the mediator's fees and expenses equally, but otherwise will bear our own attorneys' fees and mediation costs. Participation in such mediation shall be a condition to either of us initiating litigation.

Our goal is to provide you with an accurate tax return that takes advantage of all possible deductions in reducing your taxable income to its lowest legal amount. We have established a policy of extending all returns for which information is not received by our office before April 1, 2010. However, we do not file extensions for clients unless specifically requested to do so. Through this practice, we hope to better serve you. Our firm maintains and complies with a five year record retention policy.

If the forgoing fairly sets forth your understanding, please sign below in the space provided and return to our office with this organizer. We will not start processing any return without a signed engagement letter. We want to express our appreciation for this opportunity to work with you and look forward to a long and mutually beneficial relationship.

Signed: _____

Date: _____