

NETWORTH

BOOKKEEPING SERVICES

216 E CHATHAM STREET, SUITE 102, CARY, NC 27511
919-249-6200 * WWW.NETWORTHBOOKKEEPING.COM

Name(s): _____

Thank you for choosing our firm to prepare your income tax returns for tax year 2010. This letter confirms the services we will provide.

We will prepare your Federal and NC State returns for tax year 2010 based on information you provide. Our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, and we ask that you not refer to these services as an audit or review. We may ask for clarification of certain information, or request additional information, so that we can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions for tax year 2010, and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates. You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts in order to substantiate your claimed deductions, and purchase and sales information for assets.

It is your responsibility to review your returns for accuracy before they are filed to determine that all income and deductions have been correctly reported. Filing your returns, and making any payment to the appropriate agency by their respective due dates is your sole responsibility.

Our fees are for preparation of tax return forms only based on already complete, summarized information. Any additional time or expenses such as accounting, bookkeeping, summarizing, or any other out-of-pocket expenses incurred on your behalf will be billed as additional charges as necessary. Our invoices are due and payable in full upon completion of your tax return and will not be filed or submitted until any and all balances are paid in full.

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax returns, please sign in the space indicated and return it to us at your convenience.

Thank you again for choosing our firm to prepare your 2010 tax return. We appreciate your business.

Sincerely,

netWorth Bookkeeping Services

Accepted by: _____

Signature: _____

Date : _____

Client Signature: _____

Date: _____

Printed Name: _____

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Please be sure to bring the following forms with you to your tax appointment:

- Last Year's Tax Return
- W-2 Form for Wages
- 1099-R for Retirement
- 1099s for Interest, Dividends, and Other Income
- K-1s from Partnerships, Corporations or Estates
- Social Security Benefits Statement
- Copy of Voided Check for Direct Deposit
- Property Tax Statements
- IRA Year-end Statement
- 1098 - Mortgage Interest, Tuition, Contribution
- Closing Papers for Purchases & Sales, including purchase/sale dates & amounts
- All Other Statements Showing Income
- Last Pay Stub of the Year
- Income Statement and Balance Sheet for Business Income and Expenses

You may also download and use our Client Tax Organizer posted on our website to provide the most complete and accurate information in order for us to help you get the most deductions allowable.

Please feel free to contact us for more information at:

919-249-6200 or Taxes@netWorthBookkeeping.com