

EAST COUNTY TAX PROFESSIONALS, INC

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Dear Valued New Client:

The **2018 Tax Organizer** will assist you in collecting and reporting information necessary for us to properly prepare your **2017 Income Tax Return**. **Please complete the organizer sheets as appropriate and bring in supporting documents** where necessary. **SIGN OUR "Permission slip" to do your Taxes Before your appointment or before mailing to us!** *Your information is kept Confidential* in accordance with the FTC Laws.

PLEASE PUT THIS TAX PACKET IN A SAFE PLACE UNTIL YOUR TAX INFO COMES TO YOU, then bring it all in to us at the time of your appointment or when you drop it off, mail or email it to us.

APPOINTMENT DATE _____ DAY _____ TIME _____

WE still ACCEPT DEBIT AND CREDIT CARDS FOR PAYMENT FOR YOUR CONVENIENCE!

***** ONLY NEW CLIENTS must provide the following:**

- 1. Copies of Social Security cards for anyone listed on your tax return.**
- 2. Copy of prior year's Tax return(s) required to make sure any carryovers aren't missed.**
- 3. New parents remember to get Social Security cards for new babies or adoptions to your family. (Our Congratulations to you on your newest family member.)**

Please provide the following information, if it applies to you:

- *-Form(s) W-2's (wages)
- *-Form(s) 1099's(interest, dividends, etc.)
- *-Schedule(s) K-1's(income/loss from Partnerships, S-Corporations, LLC's)
- *-Form(s) 1098 (mortgage interest) and property tax statements
- *-Brokerage statements from stocks, bonds or other investment transactions
- *-Closing statements pertaining to real estate transactions
- *-All other supporting documents (schedules, checkbooks, etc.)
- *-Any tax notices received from IRS or State taxing authorities
- *-Bookkeeping records for small Businesses. (including purchase receipts of assets)

Please SIGN your Permission Letter to do your tax return BEFORE you come in or mail in your information to us. We cannot do them unless you sign this form. This is for your protection as well as ours for liability purposes.

Thank you for your trust in me and my staff to help you with your income tax preparation. We look forward to seeing you soon!

Sincerely,
Lauren King, EA