

Dear Friend:

Welcome to tax season 2010. Here is our customary annual written statement about our policies for tax preparation work. Let us know if you have any questions.

1. Tax **organizers** will only be **provided upon request**. While some appreciate this important reminder to assist in preparing documents for your return, others have different methods for accomplishing that task. We encourage the use of the organizer as it often eliminates misinterpretation of data and provides a reminder of income and deduction items that might otherwise be overlooked. It is available either as a paper document, provided by email, or as an online tool which you can print or complete through our website. The **online organizer** requires that we set up a **new password** for your access each year, so please call us even if you used this system last year.
2. The current trend in our profession is for **more documentation** on everything we do. Your organizer can be a key to this documentation. Additionally, the standards and compliance rules may require that we request more data from you than we have previously. Please understand that we need to prepare your file to be able to support your return in case it is challenged.
3. The IRS has announced that **mandatory efilg of returns** for tax preparation services is imminent. Patrick & Robinson has been proactive in this movement, so we will implement an early adoption policy for 2009 returns. All returns that can be filed electronically will be.
4. Please confirm your **contact information** for us on the attached form! Also, if you want direct deposit of your refund or withdrawal of your payment please ensure that we have your current banking information.
5. The economic times have affected all of us to some degree. Therefore, you will be pleased to know that we will not raise our base fee for the 2009 tax season. We will also offer you a **\$50 discount** if you leave a deposit of \$450 by February 15, 2010 (please see below for terms).
6. In the spirit of environmental awareness, we will provide **only electronic copies** of your return unless you **specifically request a hard copy**. There will be an additional charge of \$20 for the printed return for handling and supplies.

Also included in this year's packet are some Tax Updates for your information. As always, thank you for your confidence and business. Have a productive, prosperous year, and we look forward to working with you.



Mark Patrick



Adam Robinson

Discount Terms

1. Discounts only apply to individual (1040) returns.
2. To qualify, all accounts must be current and the deposit payment received on or before February 15, 2010.
3. The base fee for most returns will be \$500 if substantially all documents are received before March 25, or \$550 if received on or after March 26, 2010. Additional fees apply when state returns are filed, when preparation time required exceeds that of an average return, or when work is requested in less than the standard three-week turnaround period.
4. Returns with prepaid deposits will receive priority treatment.
5. Fees for work received on or after March 26 include a request for an extension of time to file; please note that **an extension does not extend your obligation to pay your tax on time**, and you will be responsible for any interest or penalties for payments after the original due date of the return.



Patrick & Robinson 2010 Data Sheet
(Please complete all applicable information)

Name/Birthdate/SSN _____

Spouse's Name/Birthdate/SSN _____

Child(ren)'s Name(s)/Birthdate(s)/SSN(s) _____

Address _____

Telephone _____

Home

Office

Cell

Spouse's Telephone _____

Home

Office

Cell

Email Address _____

Self

Spouse

Occupation _____

Self

Spouse

If you wish to utilize direct deposit/withdrawal of IRS refunds/payments please attach a voided copy of a check from the account you wish to use. Please note that refunds from joint filings must go into a joint account.