ACT FINANCIAL AND TAX SERVICES,LLC
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Dear Client,

We wish you a happy, healthy and prosperous New Year.

Enclosed is the 2016 tax organizer to guide you in gathering the necessary information in order for us to prepare your tax return. We have provided this organizer as a tool to assist you in providing your tax information to us. Kindly confirm and update your current contact information in the organizer. This makes it easier for us to reach you if we have any questions.

Please sign the engagement letter where indicated and return it to us with your data in order to ensure an understanding of our mutual responsibilities. Please do this even if you do not use the complete organizer in gathering your tax information. Signed engagement letters are requested prior to our preparing your returns, however sending us your tax data will imply agreement with the terms of our engagement.

If you would like to email us your tax files via Citrix Sharefile, just email us at admin@actcpa.com and we will send you a Sharefile link.

The filing deadline for the tax returns is Tuesday, April 18th. In order to meet this filing deadline, the information needed to complete your returns should be received in this office no later than April 4, 2016. Our objective is to minimize extensions. Complete and timely submission of your tax data is important. Therefore, all returns received AFTER April 4, or those with incomplete information as of that date, will be placed on extension in order for us to prepare a complete and accurate tax return for you. If any extensions are required, an estimate of tax due will be calculated for you and must be paid with the extension in order to avoid interest and penalties. The extension provides you additional time to gather your information. The deadline for tax filing with the extension is October 16, 2017.

I am always thankful for great clients like you. Our business is growing because of referrals from clients like you. I appreciate every referral and pledge to deliver the very best in service.

We want to express our appreciation for the opportunity to work with you, not only at tax time, but also throughout the year. If you have any questions, please contact us.

Sincerely,

Cristina Andreana

ACT Financial and Tax Services, LLC

DATA AND DOCUMENT SUBMISSION INSTRUCTIONS

Please use paper clips or binder clips to attach documents wherever possible. Your completed tax organizer and all supporting documents will be scanned into our filing system. Staples cause pages to stick together even after the staple is removed.

When providing the required documents listed below, you do not need to fill in all fields on the organizer, we will use the data from respective forms.

In an effort to be environmentally responsible we have printed the organizers on both sides of the paper. Please be sure to refer to all pages when providing your tax data.

If you paid estimates in 2016, please confirm the amounts provided in the organizer are the actual amounts you paid, notate any changes if necessary. We will report that all estimates have been paid by you unless you note otherwise.

If an account or item is listed on the organizer that has been closed or does not apply to the tax year 2016, kindly cross out or indicate the item is no longer relevant. This will avoid delays in completing your return.

The following documents, if applicable, are **required** in addition to your completed tax organizer in order to complete your return accurately and completely.

Form(s) W-2, including any corrections on Form W-2C.

Form(s) 1099, only if such amounts reflect income tax withholding.

Complete consolidated brokerage form(s) 1099 B - INCLUDING REALIZED CAPITAL GAIN AND LOSS SCHEDULES showing cost basis and date of purchase. (not just gross proceeds schedules).

Forms 1099 – R, MISC, INT, DIV, B, G, K, C, H, S, and consolidated

Schedules K-1 (federal and states) from partnerships, trusts, estates and S Corporations.

Closing (HUD) statements from the sale, purchase or refinance of real estate, including Form 1099-S.

Forms 1095-A, 1095-B, 1095-C, if you have received any forms under the ACA, please provide the form to us. Otherwise, please let us know if you had healthcare insurance and for what months on the organizer.

Copies of any documents for unusual transactions or those transactions which you are unclear on where to include in the organizer etc. (for example stock option grants etc)

If this is our first year preparing returns for you, please provide a copy of your prior year federal and state returns, if not previously provided.