

# Bob McCombs, CPA

**IMPORTANT: Please note that Partnership and S Corporation returns are due on March 15. Calendar year C Corporations are due April 15.**

This letter is designed to help you gather the information needed to prepare your income tax return. Please gather your information as you have in the past and either send it to us or have it ready for our appointment.

We accept bookkeeping information in several media formats, including secure e-mail (Preferred), CDs, DVDs, USB flash drives, and printed reports. We support regular and Pro versions of Quickbooks and Quicken. We do not support the Mac. Please note the program version and any password on the media you provide. If you send a printout (either paper or PDF), please provide the "Transaction" report subtotaled by category [Quicken] or the "Transaction Detail by Account" report [Quickbooks].

We ask that you have available (or send us copies of) the following items:

- The **SIGNED** "Questions" sheet with at least boxes 1 & 2 checked.
- A copy of Form W-3, if NOT prepared by us.
- A copy of Form W-2 for all officers and owners, if NOT prepared by us.
- K-1 forms showing income from partnerships, S corporations, estates/trusts.
- Closing statements (HUD-1) for real estate purchased, sold, refinanced, repossessed or foreclosed.
- Receipts/contracts for assets (incl. cars) bought, traded, sold, or leased.
- If you claim car expenses, the total and business mileage for each vehicle.
- If you have an outside audit or review, a copy of the accountant's report.
- Any correspondence sent to you by the IRS or other taxing authorities.

.....,

<b>CALENDAR YEAR</b>	Prepare return without an extension	Feb. 15
<b>PARTNERSHIP &amp; S CORP</b>	Prepare a six month extension	Mar. 13
<b>DEADLINES:</b>	Prepare return if an extension has been filed	Aug. 15

We charge at least a \$500 express processing fee for information received after Aug. 15 or between Feb. 16 and Mar. 15 where you refuse to file an extension. We will prepare an extension at your request or if we receive your information by Mar. 13.

.....

<b>C CORPORATION,</b>	Prepare return without an extension	Mar. 15
<b>TRUST, AND ESTATE</b>	Prepare an automatic five month extension	Apr. 10
<b>DEADLINES:</b>	Prepare return if an extension has been filed	Sep. 15

We charge at least a \$500 express processing fee for information received after Aug. 15 or between Mar. 16 and Apr. 15 where you refuse to file an extension. We will prepare an extension at your request or if we receive your information by Apr. 10.

Thank you for the opportunity to serve you.

Sincerely,

Bob McCombs, CPA