



January 10, 2011

Happy New Year! I hope you had a great holiday season. I have attached my Questionnaire and Engagement Letter which should be completed and returned with your tax documents. **Please review and sign the Engagement Letter** which lays out the services I will be providing and should answer any questions you may have regarding our relationship. **I will not be able to prepare your return without a signed engagement letter and completed Questionnaire in your file.** Also, please update your address, email and phone numbers for accuracy.

To save the planet I did not mail out paper tax organizer this year. If you would like an organizer I can email or mail it to you for your review and completion. Just contact me to request it.

Please provide me with the information needed to prepare your income tax return as soon as possible, even if you are missing some information (such as partnership K-1's). If you are unsure about the relevance of certain documents, feel free to include them. I will return all original items provided with your completed Federal return.

Based on my experience in previous tax years, **I will likely have to extend your return if your information is received after March 25, 2011.** An extension will not prolong any payment due to the IRS, it will only increase the time spent on your return and, therefore, increase your IRS and accounting fees.

I truly appreciate your business and look forward to working with you again this year. Please feel free to call with questions regarding your personal or business financial needs. I want to thank you for your continued business and all your referrals! **Make sure to remind me about your Referral Discount if you sent a new client my way last year!**

Sincerely,

Brian Berlage, C.P.A.