Thank you for allowing us to prepare your tax return for you this year. We look forward to the challenge as much as you dread the idea of preparing it yourself.

Because we know what a strain tax preparation can be on your time, energy, patience, and pocketbook, Tax Prep Financial Services is here to help lighten your load. At Tax Prep, we make it as easy as completing a few worksheets and forgetting about all those confusing tax forms and schedules. From these worksheets, we will endeavor to find you every possible tax deduction available under current tax law and get you every dollar you have coming.

Please complete either the **PRE**-2018 or **POST**-2017 Income Tax Data-Itemizer, depending on which tax year you wish us to prepare, and (regardless of the tax year) 2020 Healthcare Coverage Questionnaire if you live in a state that assesses a state income tax. **For 2020 you MUST also answer and submit our NEW COVID-19 Questionnaire.** Then provide us all your Forms W-2, 1095, 1098, 1099, and Schedules K-1 (from partnerships, S Corporations, or trust funds). Also, please complete our *MINISTER* worksheet. On the Depreciation Worksheet, complete the first four columns pertaining to all furniture and equipment that you use in your business. (Some examples would be chairs, lamps, tables, desks, file cabinets, bookshelves, computers, laptops, iPads, copiers, calculators, phones, fax machines, answering machines, TVs, DVD/Blu-Ray players, CD players, stereos, cameras, video recorders, etc.) We will do the rest for you! **Be sure to read the Policy Statement, as well as read, sign, and remit the Tax Return Engagement Letter with your tax data. Also, be sure to initial where indicated attesting to the veracity of your charitable contributions and your business mileage. We DO NOT need to see your receipts, except for non-cash charitable contributions when the total of those for the year exceeds $500.** Finally, send us a copy of your medical insurance card and last year's return.

If you have been in business several years, send us copies of those tax returns (up to 3 years back) and complete a *MINISTER* worksheet for each year so that we can review them to see if we can get you any refunds from those years. When you have compiled everything please upload it into our Secure Portal and begin to "Pay YOURSELF, not the IRS." To submit it via the Secure Client Portal at our website, please email us your request and we will set up your account. Then you can create your own individualized username and password, and begin to upload your documents to that newly accessible folder. Just to be sure, please notify us that you have done so, and we will retrieve your documents, log you in, assign you a number, and begin working on your data. Several days after you submit your data to us, you may request your number in line and then follow my progress toward your number on the "Home" page of our website (much like at the DMV).

Thank you for your business! We look forward to serving you!

Sincerely,

Jeff Peterson

Jeffrey C. Peterson
President
TAX PREP FINANCIAL SERVICES