



DEAR CLIENT:

This easy to use organizer has been prepared to assist you in collecting information for your Individual Income Tax Return for tax year 2009. For returning clients information (pages 3 and 4) from your prior year tax return have been included for you to edit as necessary. Please line thru data that does not apply to the current year and provide other information as required. If necessary, attach additional sheets with pertinent facts that may not have been requested in this organizer.

If you would prefer you could download this organizer online, please go to www.peppercpa.com and click on organizer Client Organizer link in the upper left corner. If you have any questions, please make note of them within the organizer so that we can discuss them when we prepare your tax return.

Please provide all records and necessary information requested, including:

- Prior year federal and state return (new client only)
- W-2's for wages, salaries, tips and pensions
- 1098's for mortgage interest paid to financial institutions
- 1099's for interest dividends, state tax refunds and other payments
- K-1's from partnerships, S corporations, estates and trusts
- Additional correspondence from tax agencies
- **Please note that if a form is provided it is not necessary to re-state the information on the organizer. Please mark "x" on the provided blank if you have attached the required form**

Using this organizer will assist you in compiling complete and accurate tax data that will make it possible to take full advantage of all allowable tax deductions.

Please contact us as soon as possible to schedule an appointment to review your organizer and prepare your tax return. Please be sure that all information is complete before your tax appointment. You will save time and possible additional charges by supplying all information at the appointment.

Thank you ...I look forward to seeing you....LEE



ENGAGEMENT LETTER, TERMS, CONDITIONS and CONTRACT

ENGAGEMENT LETTER

We will prepare your FEDERAL and STATE individual or business income tax returns from information you provide. We will not audit or verify the data you submit. We may ask you to clarify submitted information or to furnish us with additional information. We will not accept original documents...you must submit copies. In order for us to provide complete, cost effective, accurate tax returns we ask that you obtain all information prior to your initial tax appointment. **All business return information must be submitted prior to 2-25-2010 to insure completion prior to 3-15-2010. Submission of all individual return information is required prior to 3-15-2010 to insure that your personal tax return is completed by 4-15-2010.** You should retain all documents, cancelled checks and banking records to ensure that this and other data that form the basis of income and deductions are available for audit by taxing authorities. Final responsibility for income tax returns is yours. You should therefore review the returns very carefully, before signing them or authorizing submission of E-filed returns. Fees for audits or other responses to other IRS correspondence are not included in the tax return preparation fees.

TERMS AND CONDITIONS

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover fraud, defalcation or other irregularities, should any exist. We will render additional services necessary for the preparation of the items identified on page (2) of this contract, for the stated hourly rate. We will use our professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between taxing authority interpretation of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

CPA's, like all providers of personal financial services are now required by law to inform their clients of their policies regarding privacy of client information. CPA's have been, and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy. *Types of Nonpublic Personal Information We Collect:* We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. For current and former clients, we do not disclose any non-public personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Retainers are based on the prior year charge, payment is due when the engagement commences (first tax appointment), unless arrangements are made in writing, in advance. **Past due accounts are subject to an interest charge of 2.0 percent per month, compounded monthly.** Accounts become past due 10 days after clients are notified that their returns are complete or that additional information is required to complete the work identified in this contract.

Client agrees to pay all reasonable collection costs incurred by G Lee Pepper, CPA, at standard hourly rates, for collection of delinquent accounts covered by this agreement. The amounts due shall include, but are not limited, to all reasonable attorneys' fees and accrued interest (at 2% per month). G Lee Pepper, CPA reserves the right to retain the services of others to collect any delinquent account. All disputes will be governed by, and under, the laws of the State of Arizona.

G Lee Pepper, CPA accepts American Express, Visa and MasterCard. Client acknowledges that signature on this agreement is provided in lieu of, and substitutes for, an actual signature on a credit card charge slip. G Lee Pepper, CPA will not charge a credit card without prior notice to the client. The charge to your credit or debit card will appear as "Technet Sales".

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. We will provide you with a digital copy and one signed copy of your tax return when it is completed and delivered. Please retain it for future reference or use. If you require additional paper copies at future date's they will be provided to you at additional cost. These charges will be at the clerical hourly rate, plus any other actual amounts incurred.

G Lee Pepper, CPA does not accept responsibility for penalties or interest charges levied by taxing authorities. We suggest all tax returns and other correspondence be remitted via certified mail – return receipt.



CONTRACT

Client: _____ SR#: _____

Address: _____ Appt. Date/Time: _____

City: _____ State: _____ Zip: _____ Phone: _____

Referred: _____

We propose to complete the following:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____

for the sum of: \$ _____, as a retainer. The work, as identified above, will be billed when completed, subject to the terms and conditions in this contract. Professional services will be provided at \$180.00 PER HOUR. Clerical work will be billed at \$45.00 PER HOUR. Postage, filing fees and other direct costs will be billed at actual cost.

Important Notice

Increased enforcement regarding LATE FILING penalties require their clients provide all information necessary to file completed extended tax returns on or before July 31, 2010. Submissions after that date will require payment of a \$ 250.00 late submission premium which must be paid in advance. Extended personal returns submitted after October 1, 2010 (September 1, 2010 for business returns), will require a \$500.00 late submission fee to be paid in advance.

Upon acceptance of this organizer client agrees to all terms and conditions when submitted online.

By affixing my authorized signature, I agree to all terms and conditions, as outlined on pages one (1) and two (2) of this agreement.

Client Signature Date

Acceptance – G. Lee Pepper, CPA Date



ENGAGEMENTS - TAX PREPARATION

We will prepare your FEDERAL and STATE Individual Income Tax Returns, business tax returns or complete other engagements from information you furnish to us. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of the information or furnish us with additional data. With respect to tax preparation, it is your responsibility to provide all information required for the preparation of complete and accurate tax returns by 03-15 of the current tax year to ensure that your return will be completed by April 15. You should retain all documents, cancelled checks and banking records to ensure that this, and other data that form the basis of income and deductions are available for audit by taxing authorities. Final responsibility for the income tax returns are the clients. Clients should therefore review the returns very carefully, before signing them. Fees for tax audits are not included in the tax return preparation fees. We prefer to have copies of all client documents submitted. We will not be responsible for original documents. Please submit copies.

CREDIT CARDS

G. Lee Pepper, CPA accepts American Express, Visa and MasterCard. Client acknowledges that if a credit card is provided to pay for services rendered and that the charge will appear on the client's credit card statement identified as "Technet Sales". Client further acknowledges that signature on this agreement is provided in lieu of, and substitutes for, an actual signature on a credit card charge slip. G. Lee Pepper, CPA will not charge a credit card without prior verbal acceptance of the amount of the charge by the client.

LIMITATIONS

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover fraud, defalcation or other irregularities, should any exist. We will render additional accounting or bookkeeping services necessary for the preparation of income tax returns for an hourly rate. We will advise you of any additional charge, if applicable, before starting the work. We will use our professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between taxing authority interpretation of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

COLLECTION COSTS

Client agrees to pay all reasonable collection costs incurred by G. Lee Pepper, CPA at standard hourly rates, for collection of delinquent accounts covered by this agreement. The amounts due shall include, but are not limited, to all reasonable attorney's fees and accrued interest (at 2% per month). G. Lee Pepper, CPA reserves the right to retain the services of others to collect any delinquent account. All disputes will be governed by, and under, the laws of the State of Arizona.

PENALTIES

G. Lee Pepper, CPA does not accept responsibility for penalties or interest charges levied by taxing authorities as a result of failure by third party providers (such as the United States Post Office, Federal Express, UPS and so on) to (timely) deliver items remitted on clients behalf by G. Lee Pepper, CPA by regular mail. This includes acknowledgement or acceptance tax returns or other written information submitted to the IRS or other taxing authorities. If items are to be remitted via certified mail they will be so identified in this agreement. In the event a dispute develops G. Lee Pepper, CPA will supply certified mail acknowledgements or return receipt documents to the regulatory authorities as required by this agreement.

PRIVACY DISCLOSURE

CPA's, like all providers of personal financial services are now required by law to inform their clients of their policies regarding privacy of client information. CPA's have been, and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy. Types of Nonpublic Personal Information We Collect: We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

PAYMENT FOR SERVICES

Payment for services is due when the work is completed unless arrangements are made in writing, in advance. Past due accounts are subject to an interest charge of 2.0 percent per month, compounded monthly. Accounts become past due 10 days after clients are notified that their returns are complete and ready to be filed. Evidence of the debt may require a note executed by the client and accepted by G. Lee Pepper, CPA prior to delivery of the work. In addition the debt will be subject to the terms as outlined in this document with respect to collection and attorneys fees.

RETENTION OF RECORDS

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. We will provide you with a signed copy of your tax return when it is completed. Please retain it for future reference or use. If you require additional copies at future dates they will be provided to you at additional cost. These charges will be at the clerical hourly rate, plus any other actual amounts incurred.

OUTCOMES

G. Lee Pepper, CPA and it's Managing Members do not guarantee the outcome of any engagement accepted and or completed by the firm. We will use our energy and professional experience to interpret the tax law and other governing principles. We will do that in order to advocate in support of positions that are in keeping with those standards and that, in our opinion, reflect the client's best interest. Our fees are in no way contingent on the result of the work we complete.

OUR STATEMENT TO CLIENTS

We do appreciate the confidence that you have placed in us by retaining our services. Since we are we are compensated for the time we expend on behalf of our clients not the outcome of the engagement, our pledge to you, is that: we will provide conscientious service, to the best of our ability, that is in conformance with standard practice in the industry, in a timely fashion.



PERSONAL DATA

CLIENT: _____

PLEASE ADD, CHANGE, OR DELETE ANY INFORMATION THAT IS NECESSARY TO UPDATE YOUR FILE.

	TAXPAYER	SPOUSE
FIRST NAME:	_____	_____
LAST NAME:	_____	_____
TITLE:	_____	_____
SALUTATION:	_____	_____
SSN:	_____	_____
OCCUPATION:	_____	_____
BIRTH DATE:	_____	_____
BLIND:	YES NO (CIRCLE ONE)	YES NO (CIRCLE ONE)
DISABLED	YES NO (CIRCLE ONE)	YES NO (CIRCLE ONE)
DEATH DATE:	_____	_____
OVER AGE 65:	YES NO (CIRCLE ONE)	YES NO (CIRCLE ONE)
E-MAIL ADDRESS:	_____	_____
HOME PHONE:	DAY _____ EVENING _____	DAY _____ EVENING _____
WORK PHONE:	_____	_____
CELL PHONE:	_____	_____
FAX:	_____	_____
PRESIDENT ELECT FD.	YES NO (CIRCLE ONE)	YES NO (CIRCLE ONE)
EDUCATION EXPENSE:	\$ _____	\$ _____
CREDIT TYPE:	_____	_____

ADDRESS: _____

CITY: _____ STATE / PROVINCE: _____ ZIP / POSTAL CODE: _____

COUNTY: _____ COUNTY / MUNICIPAL CODE: _____

SCHOOL DISTRICT NAME: _____ SCHOOL DISTRICT NUMBER: _____

IF THIS A MILITARY ADDRESS, CIRCLE APPLICABLE CODE: 1 - APO/FPO 2 - STATESIDE

FOREIGN ADDRESS

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____ COUNTRY: _____



FILING STATUS

ENTER THE NUMBER THAT CORRESPONDS WITH THE FILING STATUS CHOSEN: (1, 2, 3, 4 or 5): _____

(USE THE KEY BELOW TO DETERMINE WHICH FILING STATUS BEST FITS YOUR CIRCUMSTANCE)

1 SINGLE

___ CLAIMED AS A DEPENDENT ON SOMEONE ELSE'S RETURN

___ TAXPAYER CLAIMED AS DEPENDENT OF SOMEONE ELSE BUT QUALIFIES FOR EDUCATION CREDIT

2 MARRIED FILING JOINTLY

___ SPOUSE IS CLAIMED AS A DEPENDENT ON SOMEONE ELSE'S RETURN

3 MARRIED FILING SEPARATELY

___ DUAL STATUS ALIEN

___ ITEMIZING REQUIRED FOR SCHEDULE A

___ TAKING STANDARD DEDUCTION

___ CLAIMING SPOUSE AS A DEPENDENT

___ DIDN'T LIVE WITH SPOUSE ENTIRE YEAR

4 HEAD OF HOUSEHOLD

QUALIFYING PERSON'S NAME, SOCIAL SECURITY NUMBER, AND RELATIONSHIP SHOULD BE LISTED ON THE DEPENDENT INFORMATION SHEET.

5 QUALIFYING WIDOW(ER) WITH DEPENDENT CHILD

YEAR SPOUSE DIED (2007 or 2008) _____

FILL OUT INFORMATION BELOW IF YOU WANT TO USE DIRECT DEPOSIT

DIRECT DEPOSIT AND ELECTRONIC FUNDS WITHDRAWAL

BANK NAME	ROUTING NUMBER	TYPE OF ACCOUNT (CHECK ONE)	ACCOUNT NUMBER
_____	_____	CHECKING ___ SAVINGS ___	_____
_____	_____	CHECKING ___ SAVINGS ___	_____
_____	_____	CHECKING ___ SAVINGS ___	_____
_____	_____	CHECKING ___ SAVINGS ___	_____



TAX INFORMATION QUESTIONNAIRE

The following questions help us understand your current year tax situation. If you are filing jointly, each question also applies to your spouse. Please answer each question by circling yes (Y) or no (N). **For every question you answered yes, please provide details in the blank lines at the end of this questionnaire.** If a question does not pertain to you, please circle no. If you require help answering any of these questions, please contact us.

1. Would you like to have your tax return filed electronically?
YES | NO
2. Would you like to have an electronic copy of your tax return (PDF file)?
YES | NO
3. Would you like to have a paper copy of your tax return?
YES | NO
4. Did you receive an Economic Recovery Payment in 2009? You may have received this payment if you received social security benefits, supplemental social security income, railroad retirement benefits, or veteran's disability compensation or pension benefits. If yes, provide the amount received.
YES | NO
5. Did your marital status change during the year?
YES | NO
6. Were you a resident of, or did you have income in, more than one state during the year?
YES | NO
7. Do you wish to have \$3 (or \$6 on joint return) of your taxes applied to the Presidential Campaign Fund (this will not affect the amount of refund or balance due on your tax return)?
YES | NO
8. On your state tax return, do you wish to make any political contributions or other type of contribution?
YES | NO
9. Do you have any dependents living with you or are you supporting anyone not living with you? If yes, provide details if there were any changes to any dependents in your household (marriages, deaths, etc).
YES | NO
10. Did any of your dependent children under age 18 (24 if a college student) have any income (wages, interest, etc)?
YES | NO
11. Are you or any dependents blind and/or disabled? Please provide details including any disability income received.
YES | NO
12. Did you incur childcare or dependent care expenses?
YES | NO
13. Did you cash any series EE or I U.S Bonds that were issued after 1989 and paid qualified higher education expenses?
YES | NO
14. Did you or any member of your household pay educational expenses for post secondary education?
YES | NO
15. Did you buy, sell, or trade any assets?
YES | NO
16. Outside of W-2 contributions (401k, 403b, etc.) did you contribute to or receive a distribution from any retirement plan or did you convert any retirement funds to Roth funds?
YES | NO
17. Did you receive or pay any alimony or separate maintenance payments?
YES | NO
18. Did you have any moving expenses?
YES | NO
19. If you are self-employed, did you pay any health or long-term care insurance premiums? If yes, were either you or your spouse eligible to participate in an employer-sponsored health or long-term care insurance plan?
YES | NO
20. Did you contribute to or receive a distribution from a Health Savings Account?
YES | NO
21. Did you receive any COBRA health insurance premium assistance during 2009?
YES | NO



SCHEDULE A / B - ITEMIZED DEDUCTIONS / INTEREST INCOME

SCHEDULE A

AMOUNT

MEDICAL AND DENTAL EXPENSES:

DOCTOR AND COPAY	\$ _____
PRESCRIPTION DRUGS	\$ _____
SELF-EMPLOYED HEALTH INSURANCE	\$ _____
MEDICAL MILES DRIVEN	\$ _____

TAXES YOU PAID:

SALES TAX ON LARGE TICKET ITEMS (>1000.00)	\$ _____
REAL ESTATE TAXES (NON-RENTAL)	\$ _____
AUTO REGISTRATION (VALUE BASED PORTION ONLY)	\$ _____
OTHER (SPECIFY)	\$ _____
_____	\$ _____
_____	\$ _____

MORTGAGE AND INVESTMENT INTEREST PAID:

MORTGAGE INTEREST FROM 1098's	\$ _____
MORTGAGE INTEREST NOT REPORTED ON 1098's	\$ _____
(Please provide lender names, EIN or SSN)	\$ _____
_____	\$ _____
_____	\$ _____
POINTS PAID AT CLOSING	\$ _____
INVESTMENT INTEREST PAID	\$ _____

GIFTS TO CHARITY:

CASH	\$ _____	
OTHER THAN CASH (ie GOODWILL, DESERET)	\$ _____	
NAME OF DONEE	DATE	\$ _____ *FAIR MARKET VALUE
_____	_____	\$ _____ *FAIR MARKET VALUE
_____	_____	\$ _____ *FAIR MARKET VALUE

EMPLOYEE NON-REIMBURSED JOB EXPENSES AND MISC OTHER DEDUCTIONS:

TRAVEL EXPENSES (EXCLUDING MEALS)	\$ _____
MEAL AND ENTERTAINMENT	\$ _____
TELEPHONE AND INTEREST	\$ _____
PROFESSIONAL AND UNION DUES	\$ _____
JOB RELATED EDUCATION	\$ _____
TOOLS AND EQUIPMENT	\$ _____
SAFETY AND PROTECTIVE CLOTHING	\$ _____
UNIFORM COSTS	\$ _____
PROFESSIONAL JOURNAL SUBSCRIPTIONS	\$ _____
JOB SEEKING COSTS	\$ _____
OTHER	\$ _____
TAX PREPARATION FEES	\$ _____
INVESTMENT EXPESNES	\$ _____
SAFE DEPOSIT BOX RENTAL	\$ _____
OTHER	\$ _____
GAMBLING LOSSES (NOT TO EXCEED WINNINGS)	\$ _____

SCHEDULE B

INTEREST INCOME

NAME OF PAYER

_____	\$ _____
_____	\$ _____
_____	\$ _____



SCHEDULE E - INCOME OR LOSS FROM RENTALS AND ROYALTIES

ADDRESS OF PROPERTY A: _____

ADDRESS OF PROPERTY B: _____

ADDRESS OF PROPERTY C: _____

Was the property used for personal purpose for more than the greater of 14 days or 10% of the total days rented at fair rental value?
 (Please circle yes or no for each property)

Property A: YES | NO

Property B: YES | NO

Property C: YES | NO

INCOME AND EXPENSE FROM RENTALS	PROPERTY A	PROPERTY B	PROPERTY C
INCOME			
TOTAL RENTS RECEIVED	\$ _____	\$ _____	\$ _____
TOTAL ROYALTIES RECEIVED	\$ _____	\$ _____	\$ _____
EXPENSE			
ADVERTISING	\$ _____	\$ _____	\$ _____
TRAVEL	\$ _____	\$ _____	\$ _____
CLEANING AND MAINTENANCE	\$ _____	\$ _____	\$ _____
COMMISSIONS	\$ _____	\$ _____	\$ _____
HOA FEES	\$ _____	\$ _____	\$ _____
INSURANCE	\$ _____	\$ _____	\$ _____
LEGAL AND PROFESSIONAL	\$ _____	\$ _____	\$ _____
MANAGEMENT FEES	\$ _____	\$ _____	\$ _____
MORTGAGE INTEREST (ATTACH 1098)	\$ _____	\$ _____	\$ _____
OTHER INTEREST	\$ _____	\$ _____	\$ _____
SUPPLIES	\$ _____	\$ _____	\$ _____
TAXES	\$ _____	\$ _____	\$ _____
UTILITIES	\$ _____	\$ _____	\$ _____
REPAIRS	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
OTHER	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

ANY EQUIPMENT PURCHASED OR IMPROVEMENTS (PLEASE DESCRIBE)	PROPERTY A	PROPERTY B	PROPERTY C
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____

DATE OF FIRST RENTAL	____/____/____	____/____/____	____/____/____
PURCHASE PRICE	\$ _____	\$ _____	\$ _____
PURCHASE DATE	____/____/____	____/____/____	____/____/____