



Dear Client:

We hope this finds you well and your 2017 is off to a great start! As your CPA firm, we are committed to working with you to minimize your tax liability by preparing a complete and accurate tax return. We appreciate you and hope to build a lasting relationship.

Enclosed is your 2016 Tax Organizer to assist you in collecting and reporting information necessary for us to properly prepare your 2016 income tax return. Please complete the organizer sections where appropriate and provide supporting documentation where necessary. If you prefer to use a different method of organizing your tax information, please feel free to use whatever method works best for you.

Please provide us with the following information:

Copies of your 2015 & 2014 returns, **if not prepared by us**

2015 Depreciation Schedules, if applicable

Form(s) W-2 (wages, etc)

Form(s) 1099 & 1095 (interest, dividends, retirement, etc)

Schedule(s) K-1 (income/loss from Partnerships, S Corporations, etc)

Form(s) 1098 (mortgage interest) and property tax statements

Brokerage statements from stock, bond or other investment transactions, and cost basis of securities sold

Closing statements pertaining to real estate transactions

All other supporting documents (schedules, checkbooks, etc)

Any tax notices received from the IRS or other taxing authorities

There were some tax law changes late in 2016 that might affect your tax situation. Please see our website for copies of our recent newsletters that discuss these changes.

Please call our office if you have any questions as you organize your tax information. You can be confident that we will provide you with the best personal and professional service. We will assist you in taking every tax deduction that you are entitled to and prepare accurate and timely tax returns.

We look forward to seeing you soon.

Sincerely,

The Team of Silver Bridge CPAs