



Please follow these steps when preparing your tax return for mailing to our office:

#1- Please complete the following information so that we may contact you with any questions or to review the return before it is finalized:

	<u>Taxpayer</u>	<u>Spouse</u>
Email address:	_____	_____
Home phone :	(____) ____ - ____	(____) ____ - ____
Work phone :	(____) ____ - ____	(____) ____ - ____
Cell phone :	(____) ____ - ____	(____) ____ - ____
Fax number	(____) ____ - ____	(____) ____ - ____

#2- Use the attached checklist (Document A) to make sure you are including all of the required documents.

#3- Please sign and return these attached documents:

- I. Client questioner, with all questions answered (Document B)
- II. Engagement letter (Document C)

#4- Please provide the following information:

- If you made an IRA contribution, indicate amount and type _____
- Amount of federal estimated taxes paid for 2010 _____
- Amount of state estimated taxes paid for 2010 _____
- Amount of any FAIR/PTR rebate received from NJ _____
- Out of pocket medical expenses not covered by insurance _____
- If you itemize your deductions, amount of cash charity _____
- If you itemize your deductions, amount of non-cash charity _____
- Were any college expenses paid for 2010 (circle) YES / NO
- If you paid student loan interest in 2010, indicate amount _____
- Sales tax paid purchase of car, boat, RV in 2010 _____
- If you are a tenant, the amount of rent you paid in 2010 _____
- Homeowners, the amount of property taxes paid in 2010 _____

#5- If you are expecting a refund, and would like it directly deposited, include a voided check.

#6- Payment for services MUST be sent in with your paperwork by check. Checks will not be deposited until the fee is discussed with you and you have approved the final return.

Enclose a blank check payable to “VBC Professional Services, LLC”.

PLEASE MAKE SURE THE CHECK IS SIGNED

#7- We will mail the client copy of the return and any supporting documents to the following address via overnight mail:

(Please note that we only return documents by overnight mail. This assures your confidential documents are returned to you directly with receipt verified.)

Name: _____

Address: _____

City, State, Zip: _____

Phone # corresponding to this location: (____) ____ - ____

<input type="checkbox"/> Check this box if you authorize delivery without your signature. If not checked, someone must be present to sign for the package

#8- When your return is computed, but before it is finalized, an accountant from our office will call and discuss it with you. If you have preliminary questions that you would like answered before we start our work, just indicate this in a short note when sending in your paper work. All information should be mailed to the address below. Please mail your documents either overnight mail, certified mail or priority mail from the US postal service with delivery confirmation.

VBC Professional Services, LLC
348 Clifton Avenue
PO Box 166
Clifton, NJ 07011

If there is something that I have not made clear, please contact me at 973-365-1900.

Sincerely,

VBC & Staff



2010 Income Tax Checklist

- Copies of your 2009 federal and state tax returns (**new clients only**)
- Name, date of birth, and copy of social security card of taxpayer, spouse and any dependants.
- The amount of alimony paid or received
- The amount of child care expenses and provider information
- Form(s) W2 forms for wages earned
- Form(s) W-2G showing the amount of any gambling winnings received **and** offsetting losses
- Form(s) 1099-INT for interest earned
- Form(s) 1099-DIV for dividends earned
- Form(s) 1099-SSA for the amount of Social Security income received
- Form(s) 1099-B showing proceeds from the sale of any stock **and** the corresponding costs **and** purchase dates. If you trade options, a list of option sales and any contracts that expired worthless.
- Form(s) 1099-G showing the amount of unemployment compensation received
- Form(s) 1099-R for IRA or pension distributions
- Form(s) 1099-MISC or records of any self employment income and offsetting expenses. Include all expenses and mileage records for business use of any vehicles.
- Any rental income and offsetting expenses
- The amount of last year's NJ FAIR rebate and/or PTR rebate
- Amount of any Standard or Roth IRA contributions made
- Form(s) 1098-T for the amount of tuition paid for post secondary education for you, spouse & dependents
- Form(s) 1098-E showing the amount of student loan interest paid for you, spouse & dependents
- The amount of medical and dental expenses
- The amount of property taxes paid
- The amount of mortgage/home equity interest paid
- The amount of charitable donations (cash & non cash)
- The amount of un-reimbursed employee business expenses
- The amount of job related educational expenses
- The amount of sales tax paid on the purchase of an automobile or any other significant purchase.
- The amount of any estimated income taxes paid
- The records (settlement statement) of any home sale, purchase, or refinance

For electronic filing purposes, please also bring the following:

- Drivers license
- Social security card
- Copy of a blank or cancelled check (if you would like your refund direct deposited)

If you are unsure of the answer or need clarification of the question, leave it blank and the preparer will review during interview

YES NO

- [] [] Were there any births, adoptions, marriages, divorces, or deaths in your immediate family that may affect your return?
- [] [] Besides yourself (and your spouse) did you provide over one-half the support for any person during the year?
- [] [] Do you have any children living with you that you cannot claim as a dependent due to a divorce or separation?
- [] [] Do you have any children under age 19 (under age 24 if full time student) w/ interest and dividend income or proceeds from sale of securities in excess of \$1,900?
- [] [] Do you or your spouse owe back child support, student loan payments, or back taxes that may potentially affect your refund?
- [] [] Did you or your spouse contribute to a standard IRA, Roth IRA or education IRA?
- [] [] Did you or your spouse receive any distribution from profit sharing plan, retirement plan, IRA, 401K, or annuity?
If yes, did you use the funds for higher education, first home purchase, medical expenses or charitable contribution? _____
If yes, **and** if an IRA distribution – Did you ever make non-deductible contributions to that IRA? _____
- [] [] Did you “rollover” a profit sharing, retirement plan or IRA into another plan?
- [] [] Did you purchase, sell, refinance your principal home or your second home, or make a home equity loan during the year?
If yes, was any of this property inherited? [] Yes [] No **OR** from surviving spouse ownership? [] Yes [] No
- [] [] Did you pay or receive alimony in 2010? (does not include child support)
- [] [] Did you sell any stocks, bonds, or other investment property during the year or own securities that became worthless or have any option contracts that expired?
If yes, was any of this property inherited? [] Yes [] No **OR** from surviving spouse ownership? [] Yes [] No
If you sold stock at a loss, did you buy back a substantially identical security within 30 days before or after sale? [] Yes [] No
- [] [] Did you collect unemployment compensation or disability benefits during the year?
- [] [] Did you work as an independent contractor or have self employment income at all during the year?
If yes, did you pay for your own health insurance? [] Yes [] No
- [] [] Did you receive tip income **not** reported to your employer?
- [] [] Did you have any gambling winnings?
- [] [] Did you purchase a Hybrid vehicle or did you make any energy efficient* improvements to your principal residence?
*(windows / doors / insulation / hot water heater)?
- [] [] Did you, your spouse or your dependents attend college or a vocational school in 2010?
If yes, what year of education was completed in 2010? _____
- [] [] Did you pay for child care for a person under 13 or a dependent or spouse who is physically or mentally incapable of self care?
If yes, did you pay with pre-tax funds through your employer? [] Yes [] No
- [] [] Did you pay interest on a student loan for yourself, your spouse or your dependents?
- [] [] Did you use your car on the job (**other than to and from work**)? If so, were you reimbursed? [] Yes [] No
- [] [] Does anyone owe you money that has become uncollectable? (Must be an arms length transaction)
- [] [] Did you incur moving expenses during the year due to a change of employment?
- [] [] Did you incur casualty or theft losses (fire, house robbed, car stolen, etc.) during the year?
- [] [] Did you cash in any savings bonds this year?
If yes, were they issued after 1989 & used to pay for higher education expenses? [] Yes [] No
- [] [] Were you notified by the IRS / State of any changes to a prior year’s return?
- [] [] Do you or your spouse plan to retire in 2011?
- [] [] Did you make gifts of over \$13,000 to any one individual?
- [] [] Did you purchase an automobile, motorcycle, motor home, RV, boat or modular home and pay Sales Tax in 2010?
- [] [] Do you plan to purchase or sell your principal residence or an investment property within the next 12 months?
- [] [] Would you like to arrange for a separate no fee, no obligation conference to review your investments and your estate and financial plan with a VBC Financial Planner?

Signed: _____ Dated: ____ / ____ / ____

STOP HERE!! – TAX ACCOUNTANT WILL COMPLETE THE BACK SIDE.

Document B



INDIVIDUAL 1040 TAX RETURN ENGAGEMENT LETTER

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we provide. From the information you furnish to us, we will prepare your Federal and applicable State income tax returns.

We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will use questionnaires and/or worksheets to guide in the gathering of necessary information. All of the information you submit to us will, to the best of your knowledge, be correct and complete.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them. Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations, or other irregularities, should any exist.

We will also prepare estimated tax vouchers for the next tax year if required, based on your income and withholding taxes for this year. If you anticipate a substantial change in income or withholding taxes for next year, please advise us as soon as possible. We will then determine whether an adjustment should be made to your tax estimates.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

To keep charges low, payment for our services is due upon completion of the returns when you pick up your return at our office in the form of cash or check only, we do NOT accept credit cards. The invoice amount is based upon the complexity of the overall return and what, in terms of time, research, and forms, is necessary to accurately complete and review the returns. No returns will be electronically filed or released without payment. Any attorney fees and court costs incurred by VBC to enforce payment for services rendered shall be the responsibility of the client to reimburse VBC for the same. You will receive a completed copy of your return for your records. Please store this in a safe place, as a duplication fee will be charged if additional copies are requested at a later date.

Your returns may be subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examination. Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

By signing below, you acknowledge receiving a copy of our privacy policy brochure.

If the foregoing fairly sets forth your understanding, please sign in the space indicated. We wish to express our appreciation for the opportunity to work with you.

Accepted by: _____
 Taxpayer signature Date

Sincerely,

VBC & Staff

VBC Professional Services, LLC

 Spouse Signature Date