

# VISIONQWEST ACCOUNTANCY GROUP

A Professional Accountancy Corporation



Accounting, Tax and Business  
Advisory Services

## 2011 TAX PREPARATION SERVICES

Make Tax Appointments this year on-line at: [www.vqrginc.com](http://www.vqrginc.com)



## VisionQwest at Work for You

### CONNECTING THE RIGHT TAX RULES THAT WILL WORK FOR YOUR NEEDS

As 2011 ends and the New Year starts, it is time to meet with your tax accountant to prepare your 2011 tax return. The American Recovery and Reinvestment Act implements wide reaching changes to the tax code. There are many new changes that have affected the tax preparation of the various new and revised forms that affect your tax outcome.

We have provided you with the Tax Organizer which is designed to help you collect your tax information for us to prepare your tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special tax needs.

Please note that to the left of this letter is a list of documents we will need to prepare your 2010 tax return, along with the filled in tax organizer. We would ask that you enter your 2010 tax information in the designated areas on the worksheets.

NOTE: The General Questions and other worksheets include a variety of questions designed to assist in completing your tax return. If you answer yes to any of the questions, be sure to provide the applicable details. Please provide at the time of your appointment or through fax/email the documents listed to the left.

Call our office today to make an appointment: **818.547.0497 Ext 3**

Make an appointment On-Line at: [www.vqrginc.com](http://www.vqrginc.com)

Click on **BOOK ME or APPOINTMENTS**

Fax your documents (if not going to office for appointment) to: 818.547.0449

#### VisionQwest Office Address.

#### **VisionQwest Accountancy Group**

**A Professional Accountancy Corporation**

500 N Central, Suite 740

Glendale CA 91203

### Disclaimer:

#### **CIRCULAR 230 DISCLOSURE NOTICE:**

Any U.S. federal tax advice included in this communication (including any attachment(s) was not intended or written to be used, and cannot be used, for any purpose of (i) avoiding U.S. federal tax-related penalties or (ii) promoting, marketing or recommending to another party any tax-related matter addressed herein.

**CONFIDENTIALITY NOTICE:** The content of this form is only intended for the noted recipient. If you have received this letter or fax in error, please contact us immediately. This form is not intended to be used for the purpose of solicitation. Any information contained in this form is deemed confidential.

### TAX DOCUMENTS NEEDED FOR TAX PREPARATION

- W-2's – Original Form(s)
- Copies of other compensation or pension documentation, such as form 1099-MISC or form 1099-R
- Form(s) 1099-INT / 1099-DIV reporting interest and dividend income
- If you are filing a Schedule C – Business or Profession, if you own a business, please provide us with a financial statement and balance sheet
- Brokerage statements showing transactions for stocks, bonds, etc.
- Schedule(s) K showing income or loss from partnerships, S Corporations, or estates or trusts
- Copies of closing statements regarding the sale or purchase of real property
- Form(s) 1098 reporting interest paid, copies of real estate property tax bills, and other information relating to real property holdings
- Bring a summary total of charitable contributions (both cash and non-cash)
- Bring a summary of any job-related expenses
- Bring a summary of your medical expenses
- **BRING THE COMPLETED TAX WORKSHEET**

## VISIONQWEST TAX PROFESSIONALS

Gretta M Bernabe, CPA

Michael Joseph "JoJo" Cabuhat, CRTP

Michael Lodge, CRTP

Ranelo Angelo "Aiji" Taguibao, CRTP

Jason Sauz, CRTP

Cristina Balderas, CRTP

### Contact Information:

Phone: 818.547.0497 Ext 3

Fax: 818.547.0449

E-mail: [tax@vqrginc.com](mailto:tax@vqrginc.com)

Web: [www.vqrginc.com](http://www.vqrginc.com) On-Line Appointment

Appointment Date                      Time

\_\_\_\_\_ : \_\_\_\_\_

## ACCOUNTING AND TAX SOLUTIONS

VisionQwest Accountancy Group is a professional accountancy corporation providing business services and income tax preparation services.

### Members of:

American Institute of Certified Public Accountants  
California Tax Education Counsel  
National Society of Tax Professionals  
National Association of Tax Professionals  
Association of Certified Fraud Examiners  
National Society of Accountants  
American Association of Healthcare Consultants  
American Academy of Medical Administration



## VisionQwest Accountancy Group

### Federal and State Tax Return Preparation Agreement - 2011

Federal law requires that income tax returns and employment tax returns be submitted on or before the due date without further demand by the Commissioner of Internal Revenue. You may prepare your own tax return or you may engage a paid preparer to prepare a return for you. Any person you pay to prepare your return must sign your return in a space provided on the return. The paid preparer must give a copy of the prepared return to you for your records.

Enrolled Agents, Certified Public Accountants, Attorneys and all Tax Professionals who are paid to prepare tax returns are regulated by Part 10, Title 31 of the United States Code of Federal Regulations. These regulations require the said Tax Professional to exercise due diligence in the preparation of tax returns and to abide by the following standards when preparing tax returns:

Standards for advising with respect to tax return positions and for preparing or signing returns.

### Standard of Conduct:

**Reasonable belief** – A practitioner may not sign a return as a preparer unless the practitioner determines that the return contains a reasonable belief that the tax treatment of the position is more likely than not the proper tax treatment.

The reasonable belief standard met, the practitioner will advise the client of any opportunity to avoid the accuracy-related penalty in section 6662 of the Internal Revenue Code of 1986 by adequately disclosing the position and of the requirements for adequate disclosure.

**Advising clients on potential penalties** – A practitioner advising a client to take a position on a return, or preparing or signing a return as a preparer, must inform the client of the penalties reasonably likely to apply to the client with respect to the position advised, prepared, or reported. The practitioner also must inform the client of any opportunity to avoid any such penalty by disclosure, if relevant and of the requirements for adequate disclosure. This paragraph (a)(s) applies even if the practitioner is not subject to a penalty with respect to the position.

**Relying on information furnished by clients** – A practitioner advising a client to take a position on a return, or preparing or signing a return as a preparer generally may rely in good faith without verification upon information furnished by the client. However, the practitioner may not ignore the implications of information furnished to, or actually known by, the practitioner, and must take reasonable inquiries of the information, as furnished, appears to be incorrect, inconsistent, or incomplete.

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I (we) certify that I (we) have read and understand the foregoing preparation standards and are knowingly engaging VisionQwest Accountancy Group for federal and state tax return preparation purposes. We agree to pay the tax preparation fees of the following tax returns and understand that the Tax Professional's signature will be withdrawn by notice to the Internal Revenue Service in the event the agreement payment is not made.

\_\_\_\_\_  
Date                      Taxpayer                      Date                      Spouse

CC: Client File

**NOTE: FILL OUT TAX ORGANIZER ATTACHED**

**SIGN THIS AGREEMENT PRIOR TO TAX PREPARATION**

