

# PENCOAST

TAX SERVICES

Welcome Taxpayer,

Please take a moment to review the client tax organizer and utilize it to gather your documentation in order to prepare your tax returns. Some things to note:

- I need all original forms sent to you in order to prepare your tax returns.
- If you are a sole proprietor or single member LLC, I will need a Profit & Loss statement. All businesses are required to provide this.
- You are not required to fill in the organizer, but I would like to see a listing of documents. Example Interest – E\*Trade – 4052 (last 4 digits of account)
- If you are unsure what is deductible, ask me. Rule of thumb, if you purchase something in order to make money from it, it will be deductible. Text or email me with questions.
- Once you've registered Onvio, your document exchange portal, upload the past 3 years of filed tax returns. I will review them for completeness and make suggestions on possible amendments if something looks off.

This isn't a take home test. Use it as a guide and make a list of questions that you have for me.

All the best,  
Brandon Ferrell