January 2012

Dear friend,

Best wishes to you and yours for a happy and healthy 2012!

We look forward to working with you in 2012.

We have enclosed your 2011 tax planner to make preparing for your income taxes a bit easier for you. Please use it to help you organize your information and materials.

We've also included a checklist below to help you remember what documents and information you will need.

To schedule an appointment, please call us at **(703) 931-3290 x 100**

We're seeing clients this year on:

Tuesdays and Thursdays: 10am – 7pm
Saturdays: 10am – 1pm

If you would like to drop off or mail in your tax information, please follow the drop off instructions enclosed.

The **cut-off date for mail-in / drop-offs is April 1**. Any mail-in / drop-offs after April 1 may, for the sake of accuracy and completeness, may require an extension to be filed.

Directions to our offices at the Skyline Office Complex are also enclosed. If you need information about our other services or have any questions, please call us at (703) 931-3290.

We look forward to making your life less taxing!

Charles

Charles Coker, CPA

P.S. With your referral, a friend or business associate can benefit from my 30% off discounted rate – so pass along my name to anyone you know who needs help with their taxes ! Thanks.

Charles Coker, CPA
One Skyline Place, 5205 Leesburg Pike, #213 Falls Church, VA 22041
ph: (703) 931-3290 x 100 fax: (703) 931-3690
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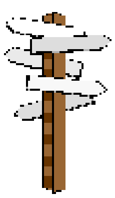
Income Tax Preparation Documents Checklist

- All your (and your spouse's) Wage and Tax Statements (W-2)
- All your 1099 forms that you received from Banks or Investments
- If you bought and/or sold real estate, the (HUD-1) Settlement Statements
- Mortgage Interest and points paid (Form 1098)
- Your Keogh, or IRA contributions for the tax year
- County Personal Property Taxes paid
- Real Estate Taxes paid
- Any estimated taxes paid
- Residency change - if you moved to/from another state: date of move
- Social security numbers and dates of birth for you and your dependents
- Your childcare provider's name, address and federal ID
- If you own a rental property, related income and expense information
- A list of Charitable Donations (cash & non-cash items) w/ estimated values
- Non-reimbursed Business Expenses (ex: continuing education, computer, travel, job search...)
- If you sold any stocks, the date you sold them, your proceeds, AND when you acquired the stocks and what their average cost basis was.
- Major Theft or Casualty Loss
- Major Medical or Dental Expenses
- Voided Check (for electronic filing refund account verification)
- If self employed – Income, expense, and equipment purchased info: Income Statement, Balance Sheet, Trial Balance and year ending bank statement(s)
- If we didn't do your taxes last year, please bring a copy of your prior year federal and state tax returns for us to review



Need Directions?

From 395

- **Take the King Street (Route 7) Exit #5 West**
- **King Street becomes Leesburg Pike**
- **Travel about 1 mile**
- **Turn left onto George Mason Drive**
- **At the 2nd traffic light, turn right and drive to the top of the hill.**
- **At the stop sign, turn left into the Skyline Visitor Parking lot, then turn right and drive down to the end of the lot.**
- **We're in Skyline Building One, 5205 Leesburg Pike.**
- **Take the elevator to the 2nd floor. We're in suite 213**

- **DO NOT PARK out front in the Skyline Health Club slots as THEY WILL TOW YOU!**

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Mail In / Drop Off Instructions: (cut off date April 1)

Mail In Instructions: Send your documents safely by Certified Mail, Delivery Confirmation, Courier, Fed Ex, or any method where the package can be traced.

Drop Off Instructions: Our office will accept drop-offs between 10am and 5pm Monday thru Friday, and 10am to 1pm on Saturdays.

1. Please review the Income Tax Preparation Documents Checklist on the previous page to insure that you've included all the necessary information.

2. You can fill out and use the enclosed tax planner to help you review your tax information from last year AND write in this years' information.

3. Review and sign the attached goldenrod Charles Coker, CPA Mail In / Drop Off Information Sheet – PLEASE be sure to include a phone number / email address where we can follow up if questions.

4. Fill out the Payment, Delivery and Contact Information form below.

How would you like your signature pages delivered so that we can electronically file your tax return?

Email ☐ Fax ☐ Mail ☐

We send all completed returns back to you via the US Postal Service with a delivery confirmation for a standard $15 shipping and handling fee. If you'd like to specify an alternative shipping method, we will add the cost of that service to our standard S&H fee:

Please provide an address where you'd like your completed return sent:

Name: ____

If applicable, Company: ____

Address: ____

City:___________________________ State: ____________ Zip: ____________

Alternative preferred shipping method, Please CIRCLE one:	Fed Ex	Courier	Certified Mail	Will Pick Up

To facilitate your tax return, we can bill your Credit Card for the cost of tax preparation and delivery. Please complete this authorization and sign it. We will include the credit card receipt with your return.

Please circle one credit card type:	American Express	Visa	MasterCard

Credit Card Number:

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Expiration Date (mmyy):

☐ ☐ ☐ ☐

Card Holder Name ____

Authorized Signature ____

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