BEAIRD HARRIS
& CO., P.C.
CERTIFIED PUBLIC ACCOUNTANTS

12221 Merit Drive, Suite 750
Dallas, TX 75251
Phone: 972.503.1040
Fax: 972.503.1120
www.bh-co.com

Dear Client:

We hope you enjoyed a fantastic holiday season and we're looking forward to serving you during the coming year! As a result of significant changes in tax law and in the accounting industry, you will notice a number of new procedures that are required to provide tax services. We apologize in advance for the extra time that will be involved, but these procedures are important and are designed to enhance accuracy and taxpayer privacy.

The 2009 Tax Organizer will assist you in collecting and reporting the information necessary to properly prepare your 2009 income tax return. Please complete the organizer sections as appropriate and provide supporting documentation where necessary. Prior year data is included in the Organizer for quick reference. Please provide copies of all tax documents such as Forms W-2, 1099, 1098 and closing statements on home re-financings, purchases or sales.

In connection with the new procedures discussed above, we are now required to obtain the following items, most of which will require the signature of both taxpayer and spouse. We appreciate your assistance and recognition that these items are now required to begin the preparation process. Please return these items when you submit your tax information:

- **Engagement Letter** – This letter defines the relationship between the firm and client and identifies the services to be rendered as well as the responsibilities and constraints of the firm. *(signature and date required)*
- **Authorization for Use of Tax Return Information –** New Treasury Regulations limit the use of tax information strictly to the preparation of the return unless the client gives prior consent for other services. You must affirmatively consent to additional services. Consenting does not obligate you to any additional services, but we must have it on file to prepare even a simple routine tax projection. *(signature and date required)*
- **Policy on Disclosure of Your Personal Information** – We are enclosing this policy according to Federal law and professional standards of the American Institute of Certified Public Accountants. There have been no changes to our privacy policy. (No action is required)
- **Hot Topics for 2009 –** Please review and answer as applicable.
- **Organizer Personal Information & Questionnaire** – Please review your demographic information for changes and answer all the questions in the ***Miscellaneous Questions*** section. <u>We will not be able to finalize your return until these questions are answered.</u>

Due to the volume of returns in March and early April, we must have your complete tax information in our office by **<u>Monday, March 15th</u>** if you wish to file by April 15th. We will make every attempt to complete all returns that are in by March 15th. **Please keep in mind that returns are done in the order in which they are received.** The earlier your information is received, the earlier it can be completed. We will prepare extensions for any returns submitted after the deadline. Those returns will then be completed over the summer months in the order received. We appreciate your business and look forward to working with you in 2010!

Best regards,
Beaird Harris & Co., P.C.