



Steven Golodny
cpa pc

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PLEASE NOTE OUR ADDRESS & PHONE NUMBERS

January, 2017

With the holidays behind us, we are focusing on the upcoming tax season. In our effort to serve you efficiently, we ask that you prepare your information early. Due to holidays in early April, we need to complete all returns by March 31st to meet the filing deadline. Please call to schedule an appointment in our office, or mail us your information as early as possible. We will begin to prepare your returns even if you do not have all your information.

We will prepare extensions if your return will not be completed by March 31st. Be aware that extensions only allow additional time to **file** your return, not to pay the tax. If any money is owed, it must be paid on time, with the extension, by April 15th.

The enclosed data sheets will help you gather information and remind you of items you might otherwise overlook. Please complete the data sheets for your tax appointment with all updated information including your address, phone number and e-mail address. **We are offering personalized organizers that include your 2015 information. Please call the office if you want to receive one.**

To save time at our meeting, please bring originals & 1 copy of your 2016 W-2's, 1099 forms for interest, dividends, social security, sale of stock, retirement and self-employment income, K-1's, realized capital gain & loss schedule, mortgage interest and real estate tax statements. The originals will be returned to you. Make an early appointment even if you do not have all your information.

As a result of recent changes in tax law at both the federal and state level, we are anticipating an increase in the complexity of and the work involved in processing client returns. We require that all tax returns be paid for at the time of preparation. Your return will not be electronically filed without payment.

REFERRALS ARE GREATLY WELCOMED

Referrals are the cornerstone of any service business. This firm, like other professional service firms, relies on satisfied clients as a primary source of new business. Your referrals are both welcome and most sincerely appreciated.

Privacy Policy of Steven Golodny CPA PC

To our Clients:

Once a year the law requires us to disclose our Private Policy to you-just as it requires banks, brokerage houses, and other financial institutions to do the same. We hope that by taking a few minutes to read this policy, you will have a better understanding of how we strive to protect the information you entrust us with.

Types of Information We Collect

We collect certain personal information about you - but only when it is provided by you or obtained with your permission.

Parties to Whom we Disclose Information

As a general rule, we do not disclose nonpublic personal information about our clients or former clients to anyone. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed to comply with a validly issued and enforceable subpoena or summons, or to allow us to render appropriate services to you.

Confidentiality and Security of Your Personal Information

Except as otherwise described in this notice, we restrict access to nonpublic personal information about you to employees of our firm and other parties who must use that information to provide services to you. We also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alteration, or premature destruction.

Thank you for allowing us to serve your accounting, tax, and financial planning needs. We value your business and are committed to protecting your privacy. We hope you view our firm as your most trusted advisor and we will work to continue earning your trust. Please call us, if you have any questions or if we can be of further service.

MISCELLANEOUS QUESTIONS

CLIENT NAME _____

Indicate if Yes or No:

1. You would like to have any overpayment of federal tax refunded _____ or applied to 2017. . . . _____
2. During 2016, did you receive any notices or settle any examinations concerning your prior years' Federal, State, or Local tax returns? **If so, attach copies of notices.** _____
3. You or your spouse made any gifts in excess of \$14,000 to any one donee or in trust during the year _____
If so, provide details on a separate sheet and include trust instrument if necessary.
4. You received grants of stock options from your employer or disposed of any stock acquired under a qualified employee stock purchase plan _____
If so, provide details on a separate sheet and copies of documentation.
5. You exercised any stock options during 2016 _____
If so, provide details on a separate sheet.
6. You disposed of any corporate bonds for which you paid other than the principal amount (i.e., discount or premium). If so, provide details on a separate sheet _____
7. You loaned money for an interest rate less than the market rate of interest _____
If so, provide details on a separate sheet.
8. You received any payments from a pension or profit-sharing plan or retirement plan this year or expect to receive next year _____
If so, provide details on a separate sheet and attach statements from the plan.
Is any portion not taxable for Federal/State tax purposes?
9. You received a Form 1099-DIV that includes dividends you received as a nominee; that is, in your name, but the dividends actually belong to someone else _____
10. You have received K-1's from partnerships, estates and trusts, or S corporations _____
If so, please attach copies of all K-1 forms received and any other relevant tax information from the entities.
11. You had income from rental property that is not listed elsewhere in this organizer _____
If so, please provide details of income, expenses, and the acquisition dates and cost of the property and any equipment, furniture, fixtures, and appliances.
12. You had a foreign bank account, securities account or signature authority over such an account at any time during 2016. _____
If so, please provide all 2016 monthly statements for any foreign accounts.
13. You paid household employee wages of \$1,800 or more or withheld federal income tax in 2016. _____
If so, provide details on a separate sheet.
14. You sold your **primary** residence or other homes during the year _____
If so, please provide copies of closing statements from the original purchase, and sale.
15. You moved in connection with your employment in 2016 _____
Where you moved to _____ When you moved _____
If so, attach copies of documentation of expenses incurred related to the relocation (e.g. shipping, travel, lodging, meal expenses, etc). Also provide on a continuation sheet the number of miles from old residence to old work place and to new work place.

16. You refinanced a mortgage during 2016. _____
 If so, provide details on a separate sheet. Attach old and new closing statements and new mortgage term. (Bring the HUD1 statements)
17. You incurred any non-business bad debts. _____
 If so, provide the following details on a separate sheet:
- A description of the debt, including the amount and the date it became due,
 - The name of the debtor, and any business or family relationship between you and the debtor,
 - The efforts you made to collect the debt, and
 - Why you decided the debt was worthless.
18. You have written substantiation for all employee business expenses (e.g., travel and entertainment expense) _____
 You should keep the following in a safe place:
- Date, place, and amount of expense
 - Actual receipts for expenses
 - Name and business affiliation of persons entertained
 - Business purpose of expense
 - Documentation of the business discussed before, during and after the entertainment
 - Receipts for hotel, airline, and other travel expense
19. You incurred any casualty or theft losses in 2016. _____
 If so, provide details on a separate sheet – date of loss, type of property, type of loss, fair market value before and after the loss, the date the property was acquired, and any insurance proceeds received.
20. You paid mortgage interest on a loan where the proceeds were not used to buy, build or improve your new home. _____
21. You received a corrective distribution from a deferred compensation plan such as a 401(k) plan. _____
 If so, please provide related documents and details.
22. Did either you, your spouse or dependents attend school on a full time basis? _____
 If so, please provide details on a separate sheet.
23. Did either you, your spouse or dependents purchase any goods or services without remitting state sales tax? _____
24. Did either you or your spouse incur any dependant care expenses that were not reimbursed by your employer? _____
 If so, please provide documentation.
25. Did you make any residential energy related improvements such as heating, insulation, roofing, windows or doors? _____
26. You received a payment from the NY State Property Tax Relief or Property Tax Freeze programs. Indicate how much you received _____
27. New York now requires information from taxpayer's driver's license or state issued ID as an added layer of security. Please bring or send us a copy of your license.

TAX INFORMATION DATA SHEET

Tax Year 2016	Taxpayer	Spouse	
Name			
Soc. Sec. No.			
Occupation			
Date of Birth		Age	
Home Address	Street Address:		
Home Address	City:	State:	Zip:
Telephone	Home:	Work:	

CHILDREN & OTHER DEPENDENTS

Name	Soc. Sec. No.	Relationship	Date of Birth	Age	Months At Home	Gross Income	
						Unearned	Earned

WAGES & SALARIES

H/W	Employer	Gross Pay	Federal Withheld	Soc Sec Withheld	Medicare Withheld	State Withheld	City Withheld

DIVIDENDS

H/W/J	Source	Amount

INTEREST

H/W/J	Source	Amount

OTHER INCOME

Business or Farming Income	
Partnerships	
Pensions & Annuities	
Social Security Benefits	
State Tax Refunds	
Unemployment Compensation	
Alimony Received	
Reimbursement Of Expenses	
IRA/SEP/Keogh Accounts	
Other	

ADJUSTMENTS

Educator Expenses	
IRA Contribution	
Student Loan Interest	
Early Withdrawal Penalty	
Alimony Paid	
Self Employed Health Insurance	
Moving Expense	
SEP/Keogh Contribution	
Health Savings Account	
Tuition and Fees	

ITEMIZED DEDUCTIONS

MEDICAL EXPENSES

Prescription Drugs	
Glasses & Hearing Aids	
Medical Travel: 19¢ per mile	
Laboratory Fees & X-Rays	
Hospitals & Doctors	
Health Insurance Premiums	
Long Term Care Premiums taxpayer	
Long Term Care Premiums spouse	
Other	
Medical Ins. Reimbursement	()
Total Medical Expenses	

TAXES PAID

Real Estate Tax	
Personal Property Tax	
Intangible Tax	
Previous Years State & Local Tax Paid this year	
Total Taxes Paid	

INTEREST EXPENSE

Home Mortgage Interest	
Home Equity Loans	
Points Paid	
Margin Interest	
Total Interest Paid	

OTHER ITEMIZED DEDUCTIONS

Casualty or Theft Losses	
Gambling Losses Up To Winnings	
Total Other Itemized Deductions	

ESTIMATED TAXES PAID

Payment No.	Due Date	Federal		State _____		State _____		MCTMT
		Date	Amount	Date	Amount	Date	Amount	
Applied	Overpayment	4/18/16		4/18/16		4/18/16		
First	4/18/16							
Second	6/15/16							
Third	9/15/16							
Fourth	1/16/17							

Have you been audited in the past? _____ . Do you have a foreign bank account? _____ .

Direct Deposit Information – Routing #

Account #

Savings /Checking Acct

CHARITABLE CONTRIBUTIONS

Churches or Temples	
Schools	
Red Cross	
American Cancer Society	
United Fund	
Salvation Army	
Charitable Travel: ___ miles at 14¢ a mile	
Total Charitable Contributions	

MISCELLANEOUS DEDUCTIONS

Tax Preparation Fee	
Safe Deposit Box	
Uniforms & Work Tools	
Union & Professional Dues	
Investment Expense	
Subscriptions & Publications	
Business Gifts & Promotions	
Business Entertainment & Meals	
Auto Expenses:	
Adoption Expenses	
Continuing Education Costs	
Business Travel 54¢ per mile	
Total Miscellaneous Deductions	

Total Itemized Deductions

SCHEDULE OF BUSINESS PROFIT & LOSS

Name _____ Business Name _____
 Address _____ ID# _____ Year _____
 Business Activity _____ Accounting Method: Cash Accrual Other

TOTAL RECEIPTS	Less Returns & Allowances \$	
Inventory at Beginning of Year		
Merchandise Purchased \$		
Cost of Labor (do not include salary paid to yourself)		
Materials & Supplies		
Other Costs:		
Total		
Less: Inventory at End of Year		
COST OF GOODS SOLD		
GROSS PROFIT		

EXPENSES:

Advertising		
Automobile Expenses		
Cabs & Local Travel		
Depreciation (see schedule)		
Commissions		
Dues & Subscriptions		
Freight, Express, Delivery		
Heat, Light, Power & Water		
Insurance & Protection		
Interest & Bank Charges		
Janitor, Cleaning Services, Laundry		
Legal & Accounting Services		
Meals & Entertaining	x 50%	
Office Expense, Printing & Postage		
Pension & Profit Sharing Plans		
Promotion Expense		
Rent		
Repairs & Maintenance		
Supplies		
Taxes: Payroll	Property	Other
Telephone		
Travel		
Utilities		
Wages (not included above)		
Other Expenses:		
TOTAL EXPENSES		
NET PROFIT OR LOSS		

DEPRECIATION SCHEDULE

Description of Property	Date Acquired	Cost or Basis	Accumulated Depreciation	Method	Years Or Rate	Current Year Depreciation

INCOME FROM RENTAL PROPERTY

NAME _____ SS# _____ YEAR _____

	1	2	3	4	5	TOTAL
PROPERTY DESCRIPTION						
GROSS INCOME						
EXPENSES						
Advertising						
Auto Expense						
Commissions						
Depreciation						
Fuel – Oil						
Garbage & Refuse						
Gardening						
Gas & Electric						
Insurance						
Interest						
Legal & Collection						
Management Fees						
Office Supplies						
Painting & Decorating						
Plumbing						
Repairs & Maintenance						
Carpenter						
Electrician						
Supplies						
Taxes & Property						
Taxes – Other						
Travel Expenses						
Telephone						
Wages						
Water						
TOTAL EXPENSES						
NET RENTAL INCOME						

DEPRECIATION SCHEDULE

Description of Property	Date Acquired	Cost or Basis	Accumulated Depreciation	Method	Years Or Rate	Current Year Depreciation

NEW YORK STATE NON-RESIDENT TAX DATA

2016
YEAR

SS# _____ NAME _____

MONTH	TOTAL DAYS			NUMBER OF				TOTAL DAYS FOR MONTH	JAN TO DEC.	DEC. TO JAN.
	IN MONTH	WORKED IN NY STATE	WORKED OUTSIDE NY STATE	SAT. & SUN.	HOLIDAYS	VACATION	SICK			
Jan.	31			8	2				31	365
Feb	28			8	1				59	334
March	31			10					90	306
April	30			8					120	275
May	31			8	1				151	245
June	30			10					181	214
July	31			8	1				212	184
Aug.	31			9					243	153
Sept.	30			9	1				273	122
Oct.	31			8	1				304	92
Nov.	30			9	2				334	61
Dec.	31			9	1				365	31
TOTAL	365			104	10					
REMARKS:										

For the purpose of this report days spent traveling on business are considered days worked. If you travel or perform services outside of New York State for more than half of any workday, it should be treated as a day worked without New York State. If more than half of a workday is spent in New York, either traveling or performing services, it should be treated as a day worked within New York.

Absences for any reason, including vacation, sickness, or injury, are considered days not worked. Non-working days, such as, Saturdays, Sundays, or holidays, should be treated as days not worked, unless you were actually required to perform services, such as traveling or participating in meetings, on such days. Employees who take work home on a weekend or holiday are not permitted to treat such days as days worked outside the State of New York for state income tax purposes.

HOLIDAYS: Jan. 1st New Years (2016) Jan. 18th MLK Jr. Feb. 15th President's Day May 30th Memorial Day July 4th Independence Day	Sept. 5th Labor Day Oct. 10th Columbus Day Nov. 11th Veteran's Day Nov. 24th Thanksgiving Dec. 25th Christmas
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Record Retention Schedule

	Retention Period		Retention Period
Accident reports/claims (settled cases)	7 years	Magnetic tape tabs cards	1 year
Accounts payable ledgers and schedules	7 years	Minute books of directors, stockholders, bylaws and charter	Permanently
Accounts receivable ledgers and schedules	7 years	Notes receivable ledgers and schedules	7 years
Audit reports	Permanently	Option records (expired)	7 years
Bank reconciliations	2 years	Patents and related papers	Permanently
Bank statements	3 years	Payroll records and summaries	7 years
Capital stock and bond records: ledgers, transfer registers, stubs showing issues, record of interest coupons, options, etc.	Permanently	Personnel files (terminated)	7 years
Cash books	Permanently	Petty cash vouchers	3 years
Charts of accounts	Permanently	Physical inventory tags	3 years
Checks (canceled-see exception below)	7 years	Plant cost ledgers	7 years
Checks (canceled for important payments i.e. taxes, purchases of property, special contracts, etc. Checks should be filed with the papers pertaining to the underlying transactions.	Permanently	Property appraisals by outside appraisers	Permanently
Contracts, mortgages, notes, and leases (expired) (still in effect)	7 years Permanently	Property records, including costs, depreciation reserves, year-end trial balances, depreciation schedules, blueprints, and plans	Permanently
Correspondence (general)	2 years	Purchase orders (except purchasing department copy)	1 year
Correspondence (legal and important matters only)	Permanently	Purchase orders (purchasing department copy)	7 years
Correspondence (routine) with customers and/or vendors	2 years	Receiving sheets	1 year
Deeds, mortgages, and bills of sale	Permanently	Retirement and pension records	Permanently
Depreciation schedules	Permanently	Requisitions	1 year
Duplicate deposit slips	2 years	Sales commission reports	3 years
Employment applications	3 years	Sales records	7 years
Expense analyses/expense distribution schedules	7 years	Scrap and salvage records (inventories, safes, etc.)	7 years
Financial statements (year-end, other optional)	Permanently	Stenographer's notebook	1 year
Garnishments	7 years	Stocks and bond certificates (canceled)	7 years
General/private ledgers, year-end trial balance	Permanently	Stockroom withdrawal forms	1 year
Insurance policies (expired)	3 years	Subsidiary ledgers	7 years
Insurance records, current accident reports, claims, policies, etc.	Permanently	Tax returns and worksheets, revenue agents reports, and other documents relating to determination of income tax liability	Permanently
Internal audit reports (longer retention periods may be desirable)	3 years	Time books/cards	7 years
Internal reports (miscellaneous)	3 years	Trademark registration and copyrights	Permanently
Inventories of products, materials, and supplies	7 years	Training manuals	Permanently
Invoices (to customers, from vendors)	7 years	Union agreements	Permanently
Journals	Permanently	Voucher register and schedules	7 years
Vouchers for payments to vendors, employees, etc. (includes allowances and reimbursement of employees, officers, etc., for travel and entertainment expenses	7 years	Withholding tax statements	7 years



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PLEASE SIGN & RETURN THIS ENGAGEMENT LETTER TO US

We would like to take this opportunity to express our appreciation for the opportunity to provide tax preparation services to you.

This letter is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide. Please review the letter and reply to us with any questions at your earliest convenience.

Tax Services

We will prepare your federal, state and local individual income tax returns for the year ended December 31, 2016. As part of the tax engagement we will perform no audit or other verification of the tax data submitted to us, although we may ask for clarification of some of the information which you supply.

It is your responsibility to provide us with all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled 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 the tax returns does not include any procedures designed to discover defalcations or other irregularities, should they exist. We will render accounting and bookkeeping assistance as we find necessary for preparation of the returns.

We will discuss with you any matters where the application of the tax law is unclear to the preparation of your income tax returns, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions.

It is your responsibility to inform us if you directly or indirectly hold any interest or signatory authority in any assets located in a foreign country. Based upon the information which you provide, this information will be used to calculate any applicable foreign tax credits.

We will also use this data to inform you of any additional filing requirements, which may include FinCen Report 114, Report of Foreign Bank and Financial Accounts (FBAR). Failure to file required forms can result in the imposition of both civil and criminal penalties, which can be significant. Please indicate if you or your spouse has a foreign bank account or foreign investment account.

Please circle one: YES NO

If yes, indicate the highest value of the account in 2016_____

You are responsible for complying with any other country's reporting requirements. We have no responsibility to discuss these issues with you. If you have specific questions regarding your tax filing obligations, please contact us to schedule an appointment to discuss your concerns.

We have not been engaged to and will not prepare any financial statements.

You may be required to make quarterly estimated tax payments. We will calculate these payments for the 2017 tax year based upon the information you provide to prepare your 2016 tax returns and have no obligation to update recommended payments after the engagement is completed. If you ask us to update your estimated tax payments, we will confirm this in a separate engagement letter and may charge a separate fee.

We assume no obligation to provide you with tax advice unrelated to the preparation of the specified income tax returns unless we are specifically requested to do so. Moreover, it is recognized that tax issues tend to be quite complex and often turn on seemingly insignificant facts. The tax laws are in a constant state of flux, with new tax rulings and bulletins being issued on a daily basis. Accordingly, it is further understood and agreed that we shall not be responsible for any tax advice which we may issue unless we have had an opportunity to fully research and consider our advice and reduce it to writing.

We will not respond to any requests from banks, mortgage brokers or others for verification of any information reported on these tax returns.

General Provisions

We estimate our fee for services described above will be \$_____, plus out-of-pocket expenses. This fee may increase due to the possibility any changes in the complexity of your return. We will keep you apprised of this should it occur. We reserve the right to assign work to any of our available staff. Invoices will be rendered by our billing department monthly and are payable upon presentation and/or collection at the time of rendering the service. Furthermore, we reserve the right to suspend or terminate our services if your account is in arrears. If we are required to terminate our services for reason of your failure to make timely payment, our engagement hereunder shall be deemed to have been

completed and you shall be obligated to pay for all services theretofore rendered notwithstanding our failure to have completed our engagement.

Should services other than those covered by the Agreement be required or requested their extent and the additional fees will be discussed and ascertained before we perform the work. Our fees do not include personal financial planning, tax or estate planning. Your returns may be selected for review by the taxing authorities. In the event of such a government tax examination, if mutually agreeable, we will be available to represent you and will render additional invoices for the time and expenses incurred.

In order to minimize the costs of our services we shall require your full cooperation. We shall inform you of the data which we will require in order to perform our work, including, but not limited to, copies of various schedules, analyses, invoices or other documents. Failure to provide the requested information accurately or not to provide it on a timely basis will likely increase the cost above that estimated in this letter. Independent contractors and consultants may participate in the services we provide to you.

The working papers prepared in conjunction with our engagement are the property of our firm, constitute confidential information and will be retained by us in accordance with our firm's policies and procedures.

In the interest of facilitating our services, we may communicate by facsimile transmission, send data over the Internet, store electronic data via computer software applications hosted remotely on the Internet, or allow access to data through third-party vendors' secured portals or clouds. Electronic data that is confidential to you may be transmitted or stored using these methods. We may use third-party service providers to store or transmit this data, such as providers of tax return preparation software. In using these data communication and storage methods, our firm employs measures designed to maintain data security. We use reasonable efforts to keep such communications and data access secure in accordance with our obligations under applicable laws and professional standards. We also require all of our third-party vendors to do the same.

We will be pleased to meet with you at various times throughout the year to discuss tax, accounting and other matters affecting the company. You should feel free to call on us at any time in this regard. Should we perform services not included as part of the compilation or tax services above, we will invoice you separately for such services. Please be advised however, that we assume no obligation to offer advice that is not specifically requested.

From time to time, as an accommodation to you, we may refer you to other service providers (e.g. attorneys, accountants, etc.), and we shall not be liable for any acts or omissions of those service providers.

All disputes concerning the amount of fees accruing under this agreement shall be submitted to binding arbitration in New York City before a single arbitrator administered by the American Arbitration Association under the Rules for Accounting Firm Disputes of the American Arbitration Association. All fees of the American Arbitration Association and the arbitrator shall be borne by the parties in equal amounts.

All other disputes arising under this agreement (including, but not limited to the scope, nature and quality of services to be performed by us and other terms of the engagement) shall be submitted to mediation. A competent and impartial third party, acceptable to both parties, shall be appointed to mediate, and each disputing party shall pay an equal share of the mediator's fees and expenses. No party may initiate a legal proceeding relating to such issues until 60 days after the mediator's first meeting with the involved parties. You agree that our liability arising out of our services provided shall not exceed the total amount paid for the services described herein. This shall be your exclusive remedy.

No action, regardless of form, arising out of the services under this agreement may be brought by either of us more than three years after the date of the last services for the year in dispute provided under this agreement.

If, as a result of our prior or future services to you, we are required or requested to provide information or documents to you or a third party in connection with legal or administrative proceedings in which we are not a party, our efforts in complying with such requests or demands shall be deemed a part of this engagement and we shall be entitled to compensation for our time and reimbursement for our reasonable out-of-pocket expenditures (including legal fees) in complying with such requests or demands. Nothing herein, however, is intended to relieve us of our duty to observe the confidentiality requirements of our profession.

We would expect to continue to perform our services under the arrangements discussed above from year to year, unless for some reason you or we find that some change is necessary.

We reserve the right to amend any of the terms in this letter at any time as a result of any changes in laws or regulations affecting the accounting profession, which may preclude us from providing the services described in this letter on the terms we have agreed upon.

It is hereby understood and agreed that this engagement is being undertaken solely for your benefit and that no other person or entity shall be authorized to enforce the terms of this engagement.

This letter comprises the complete and exclusive statement of the agreement between us, superseding all proposals oral or written and all other communications between us. If any provision of this letter is determined to be unenforceable, all other provisions shall remain in force.

We believe the foregoing correctly sets forth our understanding, but if you have any questions regarding any provisions of this letter, we will be glad to discuss them with you. If you find the arrangements acceptable, please acknowledge your agreement to the understanding by signing and returning this letter of engagement.

We look forward to many more years of pleasant association with you and our firm.

Very truly yours,
STEVEN GOLODNY CPA PC

APPROVED & ACCEPTED BY:

Taxpayer : _____ Date _____

Spouse: _____ Date _____



CERTIFIED PUBLIC ACCOUNTANTS

55 WEST 39TH STREET – SUITE 303

NEW YORK, NY 10018

TELEPHONE (212) 418-1226

FAX (212) 418-1229

8 Steps from start to finish of a tax return

1. You have received a year end letter which includes our tax data sheet for you to fill in and an engagement letter for you to read, sign and bring with you at the time of your appointment.
2. Returns are more and more complicated as the government changes the tax laws so please schedule an early appointment for your tax preparation prior to March 15, 2015. If you are mailing your information we will schedule a telephone appointment which will occur two weeks after we receive your information.
3. Please inform us if you have moved or have new contact information for your home, office or cell phone number or new e-mail address.
4. At the time of your appointment please make sure that we have all your original documents to support your income and deductions. Original documents will be returned upon completion of your tax return.
5. If it is determined that additional information is needed to complete your return you will be given an itemized list. This information can be mailed, faxed to 212-418-1229 or e-mailed to Sharon@golodnycpa.com. We do not accept any information by phone. **We request that all the missing information be sent at one time.** Do not send it to us as you gather it.
6. When possible returns will be electronically filed with the IRS and state governments.
7. For your review you will be sent a client copy of your return along with an e-file authorization form that you and your spouse must sign authorizing us to electronically file your return. **You must return this signed form to us or your tax return cannot be electronically filed. Please also note that we will now be sending your client copy and E-file authorization via our “Client Portal” which will have separate instructions on how to use prior to finishing your tax return.**
8. **No return will be completed until our fee is paid in full and your signed engagement letter and signed e-file authorization forms are returned to us.**

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