

Woltman Van Kekerix & Stotz, PC
4500 S Technology Dr
Sioux Falls, SD 57106-4214
605-361-1200

Dear :

The attached organizer is designed to help you gather tax information needed to prepare your 2009 personal income tax return. We have preprinted certain information from your 2008 tax return to help you complete the organizer with minimal time and effort.

Enter your 2009 information on the tax organizer sheets provided. The page for Salary & Wages, Pension Information, Schedule K-1's, etc. is provided as a guide to make sure all of your W-2's, 1099's, and Schedule K-1's are included. We will utilize the data directly from these documents to prepare your tax return so it is not necessary to enter the current year amounts on the organizer. If any information does not apply to you or is incorrect, please draw a line through it or make the necessary corrections.

Please include all the following information with your organizer :

- Forms W-2 for wages, salaries and tips.
- All Forms 1099 for interest, dividends, miscellaneous income, etc.
- Brokerage statements and related 1099 forms showing investment transactions for stocks, bonds, mutual funds, etc. You should also receive a **realized gains and losses report** that we will need to prepare your return.
- Schedule K-1's showing income from partnerships, S corporations, estates and trusts.
- Statements, such as Forms 1098, supporting deductions for mortgage interest and real estate taxes.
- Any tax notices sent to you by the IRS or other taxing authority during the past year.
- A copy of your income tax return from last year, **if not prepared by this office**.

Many of you may not require an appointment for the preparation of your return. In that situation, we encourage you to drop off or mail your completed tax organizer with the forms and documents listed above to our office. We try to work on returns in the order we receive them and will review the information and contact you with any questions. This allows us to be as efficient and cost effective as possible for you. If you would like an appointment to discuss your tax information or other issues, we strongly encourage you to complete the tax organizer and call our office as soon as possible to schedule an appointment.

We will again electronically file your Federal and State income tax returns. **As in the past, IRS guidelines require that you review your return and then authorize us to E-File the return by signing Form 8879. The Form 8879 will accompany your return and must be signed and returned to us before we can transmit your return.**

We encourage you to visit our new website at www.sioxfallscpa.com. The site includes

many new features including a monthly newsletter, tax and financial calculators, and links to other usefull websites. In addition, blank organizer worksheets can be obtained under the "tax center" tab.

The following is a list of our staff with their direct phone numbers and email address. If your primary accountant is not available to answer your questions when you call, please feel free to speak with any one of our other qualified accountants.

Please call our regular office number (605) 361-1200 to set up appointments or general inquiries.

SHAREHOLDERS

	<u>Phone</u>	<u>Email</u>
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We look forward to serving all of your tax needs.

Sincerely,

Woltman Van Kekerix & Stotz, PC