Weinhold, Nickel & Company, LLP
CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS

Ridgeview Business Complex
1360 Ridge Avenue
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(717) 336-3801
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Individual New Client Questionnaire

Form Completed By: ______________________

Today's Date: ______________________

Address: ______________________

____

____

____

Resident City or Township: ______________________

Resident County: ______________________

Resident School District: ______________________

Home Phone: ______________________

Your Full Name: ______________________

Nickname: ______________________

SS #: ______________________

Birth Date: ______________________

Occupation: ______________________

Cell Phone: ______________________

Work Phone: ______________________

Email: ______________________

Spouse Full Name: ______________________

Nickname: ______________________

SS #: ______________________

Birth Date: ______________________

Occupation: ______________________

Cell Phone: ______________________

Work Phone: ______________________

Email: ______________________

Dependent's Name	Dependent's SS Number	Dependent's Birth Date

How did you hear about Weinhold, Nickel & Company, LLP? ______________________

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Engagement Letter for Preparation of Tax Returns

Date:		
Name(s) as shown on tax returns:		
Street Address		*Apt No.*
City	*State*	*Zip Code*

Dear Client:

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 sign and return both pages.**

We will prepare the following tax returns *(please check the returns you wish for us to prepare)* for the year ended December 31, 2009:

_____ Federal Income Tax Return – Form 1040

_____ PA State Income Tax Return

_____ Other State Income Tax Return(s) ______________________

_____ County Income Tax Return(s) ______________________

_____ Other Tax Returns ______________________

It is your responsibility to provide us with all of the information necessary to complete your tax return(s). In that regard you state that, to the best of your knowledge and belief:

You have provided true, correct and complete information regarding your income as listed on Forms W-2, 1099, K-1's and/or other forms or written summaries presented to us. You will retain for four years all the documents, receipts, cancelled checks and other records required to substantiate the items of income and expense claimed on your return.

You have provided us true, correct and complete information regarding amounts you claimed as tax deductions, and have maintained written documentation supporting all amounts, including log books and receipts. You understand that taxing authorities may examine the returns, that documentation should be retained to support the information provided to us, especially business travel and entertainment deductions, business use percentage of autos and other assets, barter activities, and the required documents to support all charitable contributions, and that penalties may be imposed on returns that are late, underpaid or incorrect.

We will not audit or otherwise verify any information. We may require clarification or additional information. We are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.

You understand that you may be charged an additional fee if we are asked to assist or represent you in a tax examination or inquiry. You understand that, in the event of preparer error, you are responsible for additional tax and interest that may be due, but our responsibility is to pay for any penalty that the IRS, state or local taxing authorities may assess.

You will contact us immediately if you discover additional information that may lead to a change in your return, or if you receive any letters from the IRS, state or local taxing authorities.

Our policy is to put all tax advice in writing, and that you will not rely upon any unwritten advice because it may be tentative, incomplete or not fully reviewed.

We will use our judgment to resolve questions in your favor where a tax law is unclear or if there is a reasonable justification for doing so. Whenever we are aware that a possibly applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (e.g., tax agencies and courts), we will explain the possible positions that may be taken on your return. We will follow whatever position you request, so long as it is consistent with the codes and regulations and interpretations that have been established. If the IRS should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties or assessments.

Our bill will be due and payable upon completion of these returns. Additional services will not be performed until the bill for these services is paid in full. You understand that your bill will be based upon our standard billing rates.

We will not file any federal, state or local tax extensions unless we have discussed such filing with you.

If there are **other** services or tax returns that you expect us to prepare, such as estate, gift, sales, fiduciary, property, states or locals, please note them on the reverse side of this letter.

RECORD RETENTION

In accordance with our firm's current document retention policy we will retain our work papers and your tax returns for your engagement for *five years*. We will provide you a copy of the tax returns that should be a part of your books and records. If you should need replacements, we will provide additional copies at our standard copying fees. All of your original records will be returned to you. After five years, our work papers and files will no longer be available. Physical deterioration or catastrophic events may shorten the time during which our records will be available. The working papers and files of our firm are not a substitute for the original records of your company. It is agreed and understood that in connection with the performance of this engagement by Weinhold, Nickel & Company, LLP that the work papers prepared by us shall remain the property of Weinhold, Nickel & Company, LLP.

ATTORNEY FEES

If any disputes arise among the parties, they agree to try first in good faith to settle the dispute by mediation administered by the American Arbitration Association (AAA) under its Commercial Mediation Rules. All unresolved disputes shall then be decided by final and binding arbitration in accordance with the Commercial Arbitration Rules of the AAA. Fees charged by any mediators, arbitrators, or the AAA shall be shared equally by all parties. IN AGREEING TO ARBITRATION, WE BOTH ACKNOWLEDGE THAT IN THE EVENT OF A DISPUTE, EACH OF US IS GIVING UP THE RIGHT TO HAVE THE DISPUTE DECIDED IN A COURT OF LAW BEFORE A JUDGE OR JURY AND INSTEAD WE ARE ACCEPTING THE USE OF ARBITRATION FOR RESOLUTION.

We appreciate the opportunity to serve you, and look forward to a continuing, mutually satisfying relationship.

Sincerely,

WEINHOLD, NICKEL & COMPANY, LLP

The terms described in this letter are acceptable and are hereby agreed to and shall remain in effect until terminated by either party in writing.

Accepted by: ____ Date: ______________________

Taxpayer

____ Date: ______________________

Spouse (If Applicable)

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2009 INFORMATION CHECKLIST

This is a list of the most common items we'll need to finish your returns. We'll call you if we need anything else.

____ Completed Client Questionnaire

____ All return packets or mailing labels sent to you by the various taxing agencies

____ All W-2's

____ All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, etc.

____ All income information for children if you want us to prepare their required returns

____ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid

____ Total of all receipted charitable contributions, and details for any non-cash contributions over $500

____ Copies of all LLC, Partnership or S-Corporation K-l's (send separately later if everything else is ready, and let us know it's coming)

____ If you bought, sold or refinanced real estate, then a closing statement for each transaction

____ If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale date (year-end summary statements are ideal)

____ If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year

____ If you lease your car or are deducting actual expenses, please also provide: original value of the car (what you could have bought it for) and date of lease, and all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.

____ Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.

____ All legal documents for formation, sale or purchase of a business during the year

____ All legal documents for divorce decrees

____ Voided check for account where refunds should be direct deposited (optional)

____ **New clients:** copies of prior federal, state and local returns and depreciation schedules, if applicable (at least one year, preferably three)

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1040 INDIVIDUAL TAX QUESTIONNAIRE FOR 2009

Name: ____

Please check the appropriate answer and include all necessary details. We are fishing for write-offs, so be complete!

	Yes	No
Personal Information		
Did your marital status change during the year? If yes, explain: ____________________	___	___
Did your residence change during the year? ____________________	___	___
Can you be claimed as a dependent by another taxpayer?	___	___
Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or any other taxing authority during the year?	___	___
Dependent Information		
Were there any changes in dependents from the prior year? If yes, explain: ____________________	___	___
Do you have any children under age 19 or college students under age 24 with unearned income in excess of $1,900?	___	___
Did you pay any student loan interest this year?	___	___
Did you contribute to an Education Savings Account this year?	___	___
Did you maintain a home for someone not claimed as a dependent?	___	___
Did you pay for child care (babysitting, daycare) while you worked or looked for work?	___	___
If yes, please provide provider name, address and social security number/EIN and amount paid.		
Purchases, Sales and Debt Information		
Did you start or dispose of a business during the year?	___	___
Did you acquire a new or additional interest in an LLC, partnership or S corporation?	___	___
Did you sell, exchange, or purchase any real estate during the year? (send closing statement)	___	___
Did you dispose of any stock during the year? (send original cost and sale price and dates)	___	___
Did you have any debts cancelled or forgiven this year?	___	___
If yes, did you receive a 1099-C for a cancellation of debt?	___	___
Did you take out a home equity loan or line of credit this year or refinance any property? (send closing statement)	___	___
Did you purchase a hybrid (gas/electric) auto? If yes, list make, model and year.	___	___
Income Information		
Did you have any foreign income or pay any foreign taxes?	___	___
Did you at any time during the year have an interest in or signature authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	___	___
Did you receive any income from rental of property?		
Did you receive any income from property sold prior to this year?	___	___
Did you receive any lump-sum payments from a pension or profit sharing plan or 401(k) plan?	___	___
Did you make any rollovers or withdrawals from any retirement account?	___	___
Did you receive any disability or unemployment income?	___	___
Did you cash in any U.S. Savings bonds?	___	___
Did your college student receive educational benefits?	___	___
Did you receive a 1099-Q for a distribution from a 529 plan? If yes, attach form.	___	___
Did you receive a damage award for personal injury, sickness or discrimination?	___	___
Did you receive executor fees or jury duty fees? If yes, amount $ ____________	___	___
Did you receive or pay alimony (not child support)? If yes, amount $ ____________	___	___

Deduction Information	**Yes**	**No**
Did you incur an unreimbursed casualty or theft loss greater than 10% of your income?	___	___
Do you qualify for any Social Security benefits such as retirement, death, disability or Medicare? (send statement)	___	___
Do you have a donee acknowledgment to substantiate cash or check charitable contributions of $250 or more and proof of **all** charitable contributions?	___	___
Did you make any noncash charitable contributions (clothes, furniture, etc.)?	___	___
Did you have any unreimbursed employee expenses or receive an allowance during the year?	___	___
Did you use your car on the job, for other than commuting?	___	___
Did you work out of town during the year?	___	___
Did you have educational expenses for you or your dependent(s)?	___	___
Did you have major medical expenses or medical insurance premiums?	___	___
Did you have any moving or job-seeking expenses?	___	___
Are you a teacher or school administrator who provided school supplies in your job?	___	___
Do you own or invest in a business that would be considered manufacturing?	___	___
Did you pay real estate taxes? If yes, amount $______________	___	___
Did you pay sales tax on a car, boat, motor home, manufactured home, truck, motorcycle, or plane purchased for personal use? If yes, amount $ __________________	___	___
Do you have a Health Savings Account (HSA) or a Medical Savings Account (MSA)? If yes, provide the deductible $ ______________ contributions $ ____________________ qualified withdrawals $ __________ and if single ____ or married ____ coverage	___	___
If you worked for yourself, did you pay health insurance premiums for yourself and your family? If yes, amount $ _______________	___	___
Credit Information		
Have you started any adoption process?	___	___
Did you start a new pension plan this year?	___	___
Did you make energy efficient improvements to your home in 2009?	___	___
Miscellaneous Information		
Are you in the military?	___	___
Did you make 2009 gifts of more than $13,000 to any individual?	___	___
Did you engage in any bartering transactions?	___	___
Did you pay any COBRA health care coverage continuation premiums?	___	___
Are you covered by a pension plan?	___	___
Did you make any Roth or traditional IRA contribution?	___	___
Have you ever made a non-deductible IRA contribution?	___	___
Do you have extra cash to contribute more into retirement?	___	___
Do you have stock options?	___	___
Did you receive correspondence from federal, state, or local tax authorities? If yes, explain: ______________________________	___	___
Do you want to allocate $3 to the Presidential Election Campaign Fund?	___	___
Do you have a household employee?	___	___
Would you like to have your refund direct deposited (send voided check for account info)	___	___
Do you expect significant changes in income, expenses or dependents for 2010? If yes, explain: ______________________________	___	___
Do you have a current will and power of attorney for health care and financial decisions? Approximate date: ______________________________	___	___
Did you live in the Katrina or Wilma Hurricane disaster area?	___	___
State Information		
Did you contribute to a 529 Plan? If yes, what state plan? _______________; amount $ ______________	___	___

____
Signature