

December 31, 2011

Client Name Here
Proposal for 2011 Services

Dear Client,

This letter is our proposal to serve as your personal CPA from the date of your acceptance through December 31, 2012. If you have any questions, please give us a call.

Individual income tax returns are due April 15th. If you are a resident of another country and outside of the United States on April 15th you are given an automatic extension of time to file and pay until June 15th. Extended returns are due October 15th.

Services We Propose to Provide

We propose to prepare the following tax forms and to provide other services as we may agree during the calendar year ending December 31, 2012.

- 2011 US Form 1040
- 2011 US Form 90-22.1

Fees

We estimate the fee for our service to be \$??? plus out-of-pocket expenses ¹ to prepare your tax returns for filing by April 15th. The actual fee for our service may change if –

1. The organizer has not been completed
2. The return is extended
3. Additional tax forms are required
4. There is a substantial change in information from last year to this year

A retainer of \$500 is due by January 1st. The balance of the fee is due upon substantial completion of the work. Fees outstanding for more than 30 days will be charged interest at 18%.

We will issue an interim invoice acknowledging your retainer when we receive it. If your return is extended, we may issue interim invoices for work in progress. We will also issue a final invoice summarizing all interim charges for the tax returns and all amounts paid.

If you request additional services during the year, they will be provided at our usual and customary rates and will be subject to all other terms of this agreement.

¹ Out-of-pocket expenses include (1) delivery through FedEx or similar carriers and Certified Mail that we track, (2) CCH ProSystems software charges for tax return calculations (\$50) and (3) Sure Prep software charges for electronic work papers that depend on the amount of data in the return..

Your Responsibilities

- Complete the internet tax notebook.
- Provide all W-2s, 1099s, 1098s and K-1s or anything that looks like a government form.
- If you sold securities, provide a brokerage statement that not only lists the sales price of securities but also lists each sold security's acquisition date, cost and resultant gain/loss.
- Provide a copy of all settlement statements from the purchase or sale of real property.
- Provide a listing of all payments to tax authorities for the year.
- When in doubt, please ask for advice. You cannot assume that we will independently determine that advice is needed or that action should be taken.
- Promptly notify us of any changes proposed by taxing authorities to returns that we prepare.
- Responsibility for financial and investment decisions is yours. We do not make specific financial or investment recommendations and are not responsible for those made by others.

Dispute Resolution

If you have a complaint about any aspect of our professional service, we agree to (1) meet with a professional mediator, (2) share any mediator fees 50 / 50, and (3) pay our own legal fees and costs.

In the event of any litigation relating to this Agreement, the prevailing party shall be entitled to reasonable attorneys' fees and costs at trial and on any appeals. This Agreement shall be governed by the laws of the State of Oregon and the parties expressly stipulate to personal jurisdiction and exclusive venue in Portland, Oregon.

Acceptance

If this proposal for service is acceptable, please sign and return one copy of the agreement. Upon your acceptance, this will be our complete agreement. If we make any changes to the agreement, we agree to make those changes in writing.

Proposed by,

Accepted by

Ray Jordan

Date

Client Name Here

Date

December 31, 2011

Client Name Here

Request for Consent for Disclosure of Information

The purpose of this letter is to request your consent to disclose the information you provide, except for your social security number, to a contractor that helps us prepare tax returns, SurePrep, LLC. We use a computer program licensed by Sure Prep, LLC to create a work paper file to support your tax returns. The creation of the work paper file is done partially by Optical Character Recognition and partially by direct data entry and verification of data entry. The direct data entry is done by our staff in Portland as well as Sure Prep staff in India or the US. The cost of the Indian service is about 1/3 of the cost of the US service. Because we pass the out of pocket cost on to you, we are requesting permission to use the Indian service.

Required Disclosure under Revenue Procedure 2008-12

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. Because our ability to disclose your tax return information to another tax return preparer affects the service that we provide to you and its cost, we may decline to provide you with service or change the terms of service that we provide to you if you do not sign this form. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year. This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

I am responsible to you for the security of the information you provide. Signing this consent form will not result in the disclosure of your personal tax information to anyone other than for the preparation of your tax return, and we will provide you service regardless of whether you sign this form.

We request your consent to disclose the tax return information you provide us, except for your social security number, to SurePrep, LLC so they may provide Indian-based services that assist with the preparation of your return. For our mutual convenience we request that this consent be valid until December 31, 2020. If you would like the consent to be valid for a different period please indicate so in the space provided below.

If you have any questions regarding this form, please do not hesitate to call.

Yours truly,

Harry R. Jordan, CPA/CFA

_____	_____	<u>December 31, 2020</u>
Signature	Date Signed	Consent Valid Until
_____	_____	<u>December 31, 2020</u>
Signature	Date Signed	Consent Valid Until