



January 15, 2012

Dear Client and Friends,

Each year seems to pass by so quickly. Once again another tax season is upon us and we are busy preparing to be able to better serve you. We wanted to thank you for allowing us the opportunity to work with you and to provide you with the best possible tax compliance service.

Last year, by request of several clients, we have instituted an all inclusive monthly services plan that provides each client with a proactive approach to your tax compliance, accounting, payroll and benefits, financial planning and business strategy. This allows for you as a client to receive unlimited support, as well as an even more proactive attention from your professional bringing you value added strategies to ensure that you are in a better financial position. When working with your professional on this year's tax filings, be sure to ask about our Monthly Value Added Services to see which option is best for you.

Your 2011 Tax Organizers will be emailed to you from your tax professional. They are also available online this year at the following web address:

<http://www.lunsfordpeck.com/images//OnlineTaxOrganizerTaxYear2011.pdf>

Please print out the applicable organizer(s) to help organize your 2011 tax data. Once the organizer is complete, either mail, fax or email it back to your professional along with your supporting documents. Some of the common documents you need to bring include:


- Last years tax return (if not in our possession)
- Original forms – W2
- Schedules K-1 from Partnerships, S-corporations, Estates or Trusts
- Information about contributions to a pension or other retirement plan or distributions from a pension or retirement plan
- Forms 1099 or statements reporting dividend, interest (banks), retirement or other income
- Forms 1098 and copies of real estate tax bills, etc.
- Legal documents pertaining to the close of sale or purchase of real property

Remember filing deadlines for individuals and partnerships is April 15, and for corporations March 15.

If you would rather receive a printed Organizer, please contact us as soon as possible so that we can get this information to you. We look forward to an amazing tax season and are excited to be visiting with you soon.

Warm Regards,

Lunsford & Peck, LLC

A handwritten signature in black ink, appearing to read "J. Weston Lunsford". The signature is fluid and cursive, with a prominent initial "J" and a long, sweeping underline.

J. Weston Lunsford
Partner