



Dear Friends,

Happy New Year! The countdown to April 15<sup>th</sup> has begun. In order to make filing your taxes painless, we have enclosed instructions on how to make your tax experience this year fabulous. Also, in an effort to set expectations, we have included pricing information.

**Step 1 – Gather your tax information and sign Engagement Letter**

Gathering your tax information is the hardest step in this whole process. We have provided a form that will give you an idea of the tax information you should be gathering. Visit the web address [www.soulence.com/tax-forms](http://www.soulence.com/tax-forms) and download the appropriate organizer and instructions. Also, at the same web address, you will find a link for an engagement letter that we need you to sign before we can begin working on your tax return. Please include the engagement letter with the other tax information you provide us.

**Step 2 – Provide us with your tax information and Engagement Letter**

You can forward us your information in four ways.

*(1)Mail*

Our address is:

Soulence

9890 South 300 West , Ste. 201

Sandy, UT 84070

*(2)Fax*

Our fax number is 888.415.1262

*(3)Scan and Email*

Our email address for tax information is [taxinfo@soulence.com](mailto:taxinfo@soulence.com).

*(4)Drop off at our Sandy location*

We are on the second floor. Our logo is on the door.

From the elevator we are through the doors on the left directly in front of you.

From the stairs we are to your right.

Our address is: Soulence, 9890 South 300 West, Ste. 201, Sandy, UT 84070

**Step 3 – Schedule phone call or office visit to discuss tax information**

Some of you will choose to schedule an appointment THEN come in with your tax information to discuss it with us. Others will choose to mail, fax, or email your tax information and only want to talk to us if we have questions. Both options are GREAT! All we ask is with whatever option you choose, please check your email daily for the two week period after we receive your information. If you do not have email, we will try to contact you by phone. We want to be efficient and timely with your taxes and may need additional information as we complete your tax returns. Your availability and promptness in responding helps us assist you in a timely manner.



#### **Step 4 – Payment and Delivery**

We accept check, cash, and all major credit cards. You can pay for your taxes when you pick them up, or before we mail them to you. Also, we can take credit card payments over the phone.

If you would like to go over your taxes with us once completed, you can schedule an appointment through Heather. (888.400.4236)

#### **Prices and Payment**

Please be aware that the number listed is the minimum amount we charge. The plus means that the fee could go up based on complexity. The third column is the average amount we charged in 2008 per type of return.

Type of Tax Return	Price	Average Price in 2008
<b>Individual 1040</b>	\$200+	\$223
<b>Business 1065 (LLC/Partnership)</b>	\$300+	\$311
<b>Business 1120S (S Corp)</b>	\$300+	\$314
<b>Business 1120 (C Corp)</b>	\$350+	\$358
<b>Amended Returns (All)</b>	\$150+	\$167
<b>Zero Returns (No Activity)</b>	\$100	\$100
<b>W-2s</b>	\$10 per W-2 (minimum \$25)	\$25
<b>1099s</b>	\$10 per 1099 (minimum \$25)	\$25
<b>E-File (Individual)</b>	\$30	\$30

\*Payment is expected when you pick up your completed taxes or before we mail the returns to you.

**\*New Change** – *Based on last year's experience, any client who has an individual 1040 and two business returns will be **required** to pay an \$800 retainer before we begin service. This means that if your total bill was \$850, you will pay an additional \$50 at time of delivery. The \$800 retainer offsets your total bill.*

If you have any questions, at any point, about anything, please email [questions@souleance.com](mailto:questions@souleance.com) or call 888.400.4236.

Thank you for your patronage. We look forward to serving you in 2009.

Sincerely,

Your Souleance Family