



Dear Valued Client,

This Tax Organizer is designed to help you gather the tax information needed for Anderson to prepare your tax return for 2022.

Please fill the tax organizer to the best of your ability. Enter all 2022 information for which you do not have official documentation. If any information does not apply to you, please disregard that part of the organizer.

**1. Complete the Tax Organizer**

- Enter all 2022 information. If any information does not apply to you or is incorrect, please draw a line through it or make necessary changes.

**2. Gather your supporting documents and make copies.**

- See list below for examples.
- Send the copies with your completed organizer and keep originals.

**3. Submit the Tax Organizer, and any supporting documentation, using one of these methods:**

- Upload to your Box account [<https://andersonadvisors.app.box.com/>], then email [accountingadmins@andersonadvisors.com](mailto:accountingadmins@andersonadvisors.com) to let us know you have uploaded the organizer.
- Fax: 702-664-0545

**Note: To ensure your privacy, please do not submit your Tax Organizer or supporting documents via email.**

**The following are examples of supporting documentation:**

- Forms W-2 for wages, salaries, tips, and gambling winnings.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, social security, state or local refunds, etc.
- Brokerage statements showing investment transactions for stocks, bonds, options, etc.
- Schedule K-1 from partnerships, S-corporations, estates and trusts.
- Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q.
- All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage for the Premium Tax Credit.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions, including any Form 1098-C.
- Copies of closing statements regarding the sale or purchase of real property.
- Any tax notices sent to you by the IRS or other taxing authority.
- A copy of your income tax return from last year, if not prepared by Anderson.

## FEE SCHEDULE FOR TAX RETURNS PREPARED IN 2023

Tax returns are billed by the hour for their preparation and review. Billable rates are:

- Tax Preparer \$275/hour
- Tax Reviewer \$475/hour

The minimum fee for a tax return is \$900. Starting in 2023, you must be a Tax Advantage Program client or on an annual flat rate fee to have the Anderson tax department prepare your return(s). Since our preparation fees are based upon the amount of time required to prepare your tax return, your fee may exceed the minimums. This does not apply to clients who have established flat rates for tax preparation.

Anderson prepares tax returns on a first-in, first-out basis. That is, they are prepared in the order they are received. We do work with affiliated CPA firms to complete returns and reviews, so if you are facing an urgent timeline, we may be able to expedite return preparation and review through an affiliate.

Flat Rate and Tax Advantage clients will be able to submit their tax organizers starting January 14th.

In order to make the filing deadline for your 2022 income tax return, your completed organizer and backup documents should be in our office no later than 45 days before the deadline for your tax return to avoid any expedite fees (please review Client Statement for more details). Any information received after that date may require an extension to be filed for your return. Also, based on the complexity of your return, an extension may still need to be filed. Anderson will file your extension when necessary. You are responsible for paying any tax due to the IRS by April 15, 2023 in order to avoid certain late penalties and interest even if an extension has been or will be filed.

Your Client Tax Coordinator is available to assist should you have any questions regarding the Tax Organizer, uploading information to Box, or the preparation process.

Thank you for choosing Anderson for your asset protection, tax, and estate planning needs.

Sincerely,  
Anderson Advisors Tax Team

The IRS does not send out unsolicited e-mails nor make unsolicited phone calls requesting or demanding personal information or immediate payment. Such authentic looking e-mails are called "phishing" emails and responding may expose you to identity theft. If you receive such emails, forward a copy to the IRS at [phishing@irs.gov](mailto:phishing@irs.gov). Please do not respond to the email. You may also contact our office regarding any written or electronic correspondence or phone calls that you receive from the IRS.

# 2022 Tax Organizer for Partnership Returns for Traders 1065 Returns



**Nevada**  
3225 McLeod Drive  
Las Vegas, NV 89121  
Fax: 702.664.0545

**Washington**  
732 Broadway, Suite 201  
Tacoma, WA 98402  
Fax: 253.238.0003

**Wyoming**  
1718 Capitol Avenue  
Cheyenne, WY, 82001

800.706.4741  
[www.AndersonAdvisors.com](http://www.AndersonAdvisors.com)

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Use this Organizer for LPs or LLCs taxed as Partnerships Holding Trading Accounts

## **IMPORTANT**

**We are not able to complete your tax return until we have received the completed Tax Organizer and all required documentation, including but not limited to the Client Statement, payment information, partnership information, and ownership information.**

Anderson Business Advisors  
3225 McLeod Drive, Suite 100  
Las Vegas, NV 89121

Toll Free: 800.706.4741  
Local: 702.214.1100  
Fax: 702.664.0547

E-Mail: [organizers@andersonadvisors.com](mailto:organizers@andersonadvisors.com)  
Secure Online Upload Page: <https://andersonadvisors.com/upload-documents/>

# FAX COVER PAGE

Attention: Tax Preparation Department

To: Anderson Business Advisors: 702.664.0545

Attention:

From:

Date:

Total Number of Pages: (including cover page)

THIS FAX INCLUDES THE FOLLOWING (Check all that apply)

Client Statement

Organizer for (Name: \_\_\_\_\_)

Supporting Documents

Other

You may also upload all documents securely online at:  
<https://andersonadvisors.com/upload-documents/>

## CLIENT STATEMENT

Anderson Business Advisors' Tax Department will start accepting Tax Organizers to prepare 2022 tax returns starting January 14th, 2023. Please complete the Tax Organizer to the best of your ability.

Clients with a Tax Advantage Program will be able to submit their tax organizers starting Jan 14th, non Tax Advantage Program clients may start submitting their organizers after Feb 1st.

Tax returns are prepared in the order received. Any Tax Organizers submitted within 45 days prior to the deadline may need to file an extension (if possible) OR require an expedite fee of \$300.

Anderson Business Advisors reserves the right to complete work internally and through affiliated CPA firms such as H&CO, LLP as well as other qualified professionals in order to timely complete tax preparation and review services.

**If your Tax Organizer and documents are received within 45 days prior to the tax deadline, we can not guarantee the return will be timely filed. This may result in the need to file an extension.**

All tax liabilities are still due and payable by the original filing deadline to avoid underpayment penalties and interest. An extension only extends your time to file your return, not pay your taxes.

The scope of work in connection with the preparation of your ("the Client") federal and state tax returns is intended to be in compliance with the requirements issued by the various taxing authorities. Because tax laws are not always clear, honest differences of opinion may arise between our interpretation of laws and that of the various taxing authorities. We will assist you in resolving these differences in your favor whenever possible.

You and/or your duly appointed representative agree not to hold Anderson Business Advisors ("Anderson"), its representative, or its affiliated firms liable for interpretations made with regard to any of the information supplied by Client and used in the preparation of the tax returns.

Unless compelled to do so by law, Anderson does not disclose any irregularities or provide statements as to the validity of the information supplied by Client to any taxing authority.

All tax returns are subject to review and acceptance by the various taxing authorities. In the event of an examination by the IRS or other taxing authority, contact Anderson. We can respond or represent your position to the taxing authority; however, there may be a fee for this service. You may appeal any adjustments proposed by a taxing authority.

**Please review your completed tax returns carefully.** As preparers, we have a responsibility both to the various taxing authorities with whom we file tax returns as well as to our Clients. You remain liable for the contents of your tax returns prepared by Anderson from the data you provide.

All tax return preparation fees must be paid before the tax return can be electronically submitted to the taxing authority. Once payment is received and the proper forms are signed authorizing Anderson to electronically file the tax return, Anderson will then electronically file the tax return.

By signing this document I acknowledge this statement and the dates below.

Signature:

Name on Credit Card:

Last 4 digits of Credit Card being used (if Tax Package is not used):

*If you wish to use a credit card that is not on file with Anderson, please contact your Client Tax Coordinator.*

*By submitting this form, you are authorizing Anderson Business Advisors to send you an invoice electronically upon completion (via email or Box.com) and to charge the credit card provided above five (5) days after the invoice has been submitted to you.*



Anderson Business Advisors  
3225 McLeod Drive  
Las Vegas, NV 89121

Dear Valued Client:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2022 federal and requested state income tax returns from information that you furnish us. We do not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms assists in keeping pertinent information from being overlooked.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us. Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, such as gift and/or property, please inform us by noting so just below your signature at the end of the returned copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Sincerely,

Anderson Business Advisors Tax Team

Accepted By:

Date:

Additional Returns (if applicable):

## **OUR PRIVACY POLICY**

Certified Public Accountants (CPAs), like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

### **TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT**

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization.

### **PARTIES TO WHOM WE DISCLOSE INFORMATION**

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, our affiliated CPA firms we utilize to assist in the completion and/or review of tax returns and, in limited circumstances, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

### **PROTECTING THE CONFIDENTIALITY AND SECURITY OF CURRENT AND FORMER CLIENTS' INFORMATION**

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

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Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

## Partnership or LLC Information

2022

**Taxpayer:**

First Name and Initial	Last Name		
Name of Corporation	Employer ID Number (EIN)	Signing Officer Title	
Street address of Business	City	State	Zip
Daytime/Work phone Number	Cell phone	Email	

**Return Information:**

Mail Completed Return	City	State	Zip
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**Entity Information:**

Does your Entity have a year end other than Dec? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If Yes, When?		
Is this the Partnerships first return? .....	<input type="checkbox"/>	<input type="checkbox"/>
Is this the final tax return? .....	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, what is the Dissolution date?		
State of Formation	State ID No.	State Tax ID Number
What date was the Partnership or LLC formed?	What is the principal business?	
What is the main product service?		
Webfile Number (TX Only)	SOS Number (CA Only)	

Account Method	Cash	Accrual	Other	If other please explain

At any time during the year, did the entity have an interest in or signature authority over a financial account in a foreign country?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are all partners/members actively participating in this business? .....	<input type="checkbox"/>	<input type="checkbox"/>
Are any of the members claiming Real Estate Professional Status from the real estate activities being reported in this Partnership?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did those members spend a majority of their working hours and at least 750 hours of service in qualified activities in Real Estate? .....	<input type="checkbox"/>	<input type="checkbox"/>
Are the documented in writing? .....	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a Corporation that owns an interest in this entity .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please list name of Corporation? .....		
Is the Partnership publicly traded? .....		



## Partnership or LLC Information

2022

Please fill in all information- If Partner/Member is an individual, use Social Security Number. If Partner/Member is an entity, use EIN number

Name of Partner/Member		U.S. Citizen		If no, Where?	Street Address	City
		Yes	No			
A						
	State	Zip	Partner/Member's Social Security Number/EIN		If Partnership- General or Limited Partner?	Ownership%
A						

Name of Partner/Member		U.S. Citizen		If no, Where?	Street Address	City
		Yes	No			
B						
	State	Zip	Partner/Member's Social Security Number/EIN		If Partnership- General or Limited Partner?	Ownership%
B						

Name of Partner/Member		U.S. Citizen		If no, Where?	Street Address	City
		Yes	No			
C						
	State	Zip	Partner/Member's Social Security Number/EIN		If Partnership- General or Limited Partner?	Ownership%
C						

Name of Partner/Member		U.S. Citizen		If no, Where?	Street Address	City
		Yes	No			
D						
	State	Zip	Partner/Member's Social Security Number/EIN		If Partnership- General or Limited Partner?	Ownership%
D						

Name of Partner/Member		U.S. Citizen		If no, Where?	Street Address	City
		Yes	No			
E						
	State	Zip	Partner/Member's Social Security Number/EIN		If Partnership- General or Limited Partner?	Ownership%
E						

Do you have more Partners/Members? .....  Yes  No

Were there any changes in ownership during the year? .....  Yes  No

# Financial Statements

2022

If you have a balance sheet and profit and loss statement please upload those documents or include them when you fax in this organizer. Otherwise, please fill out the following financial statement information.

## Balance Sheets

		Amount
Assets	Cash in Bank on Last Day of Business Year	
	Trade Notes and Accounts Receivable (for accrual basis only)	
	Inventories	
	Other Current Assets (attach statement)	
	Other Investments (attach statement)	
	Buildings and Other Depreciable Assets	
	Less accumulated Depreciation	
	Land	
	Intangible Assets	
	Less accumulated Amortization	
	<b>Total Assets</b>	

		Amount
Liabilities and Capital	Accounts Payable	
	Mortgages and Notes Payable in Less Than 1 Year (accrual basis only)	
	Other current liabilities (attach statement)	
	All Non-recourse Loans	
	Mortgages, Notes Payable in 1 Year or More	
	Other Liabilities (Attach Statement)	
	Common Stock	
	Additional Paid in Capital	
	<b>Total Liabilities and Capital</b>	

		Amount
Statement of Income	Business Income	
	Interest Received (Enclose all 1099-INT Forms)	
	Dividends Received (Enclose all 1099-DIV Forms)	

	Amount
Not including costs and fees prior to the beginning of operations.	
Bank Charges	
Office Supplies (Including Printing & Copies)	
Business Licenses	
Legal and Professional Services	
Management Fees	
Guaranteed Payments to Partners	
Other	
Other	
Other	
Other	
Other	

## Sales of Stocks, Bonds, Mutual Funds and Other Securities

Is the brokerage account in the name of this partnership/LLC?.....  Yes  No

Please include the entire form 1099-B furnished from your Brokers along with a Gain/Loss Activity Report in Excel format. If the broker statements include the COST of the securities sold during the year and or you are sending printouts showing the cost of the securities sold, you do not need to complete this section.

Description	Date sold (Mo/Da/Yr)	Date Acquired (Mo/Da/Yr)	Cost Basis	Sales Price
A				
B				
C				
D				
E				
F				
H				
G				

Do you have more sales? .....  Yes  No

Total Options Purchased in 2022	Total Options Sold in 2022	Capital Loss Carryover from prior Year:
A		

Provide any financial statements, general ledger, previous year's tax return, gain/loss activity reports in excel and 1099-B statements.

### Additional Information or Comments?

## Start-Up and Organizational Expenses

Record costs and fees prior to the beginning of operations.

Is this the first tax return filed by this Entity? .....  Yes  No  
If yes, complete the information below.

	Amount
Organizational costs	
Start-Up Costs	
Professional Fees	
License & Permit Fees	
Equipment	
Supplies	
Other start-up costs	