



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 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. 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 Corporate Returns & 1120s 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

Use this Organizer for Corporations or LLCs Taxed as Corporations.

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, corporate 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

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.

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.

Corporate 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	Cellphone	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"/>	<input type="checkbox"/>	

If Yes,when?	<input type="checkbox"/>	<input type="checkbox"/>	
Is this the Corporations 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 Incorporation	State ID No.	Webfile Number (TX only)	SOS Number (CA only)

What date was the Corporation Formed?			
Are you registered to do business in another state(s)?			

What is the principal business?			

Entity Information:

Accounting Method	Cash	Accrual	Other	if other please explain

At the end of the tax year, did the corporation own, directly or indirectly, 50% or more of the voting stock of another domestic corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did the Corporation have any interest in a partnership or LLC?	<input type="checkbox"/>	<input type="checkbox"/>

If yes, please list name of Partnership or LLC _____

How many shareholders did the corporation have at the end of the tax year? _____

Ownership Information

2022

Please fill in all information - If shareholder is an individual, use Social Security Number. If shareholder is an entity, use the EIN number

Name of Shareholder		U.S. Citizen Yes No		If no, Where?	Street Address	City
State	Zip	Shareholder's Social Security Number / EIN			Title	Ownership

Name of Shareholder		U.S. Citizen Yes No		If no, Where?	Street Address	City
State	Zip	Shareholder's Social Security Number / EIN			Title	Ownership

Name of Shareholder		U.S. Citizen Yes No		If no, Where?	Street Address	City
State	Zip	Shareholder's Social Security Number / EIN			Title	Ownership

Name of Shareholder		U.S. Citizen Yes No		If no, Where?	Street Address	City
State	Zip	Shareholder's Social Security Number / EIN			Title	Ownership

Name of Shareholder		U.S. Citizen Yes No		If no, Where?	Street Address	City
State	Zip	Shareholder's Social Security Number / EIN			Title	Ownership

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

Financial Statements

2022

Skip the next few sections on Assets, Liabilities, Income and Expenses if you are providing a Balance Sheet and Profit and Loss Statement.

Balance Sheets

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	
Total Assets	

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	
Total Liabilities and Capital	

Income

Business Income	
Interest Received (Enclose all 1099-INT Forms)	
Dividends Received (Enclose all 1099-DIV Forms)	
Gross Rents	
Gross Royalties	
Other Income (Attach Schedule)	
Gains from Sale of Business Property (Attach Purchase & Sale, HUD Stmts & Depreciation Schedules)	

Expenses

2022

Cost of Goods Sold (For Corporations Manufacturing Goods or Housing Inventory for Resale)

Amount

Beginning Inventory	
Purchases Materials	
Purchases Supplies	
Other Costs (Explain)	
Cost of Labor	
Less Ending Inventory Balance	
Accounting	
Automobile & truck expense	
Business Mileage	01/01/2023 - 06/30/2023 07/01/2023 - 12/31/2023
Total Business Miles	
Bank charges	
Computer services and supplies	
Delivery and Freight	
Dues and subscriptions	
Equipment rent	
Gift (\$25.00 maximum per gift)	
Insurance (medical)	
Insurance (other, not life)	
Legal and Professional	
Meals	
Medical reimbursement	
Office expense	
Accounting	
Outside services/independent contractors	
Payroll Tax Expense (FICA, FUTA, SDI, etc. Employer portion only. Attach payroll reports, w3 etc.)	
Permits and licenses	
Parking and Tolls	
Postage	
Printing	
Supplies	
Telephone	
Tools	
Training/continuing education	
Travel	

Yes No

Do you offer health insurance for all your employees and pay at least 50% of the premium?		
Did you issue all necessary 1099s?		

Other Expenses (Describe)

Other	
Other	
Other	
Other	
Other	

Pre-Incorporation Expenses

Is this the first Corporate Tax Return filed by this Entity?

Yes

No

If no, skip this section

DO NOT INCLUDE FEES FOR ENTITIES MANAGED BY CORPORATION

	Amount
Organization Costs	

START-UP COSTS (COSTS INCURRED PRIOR TO DATE OF INCORPORATION)

Seminar & Education Costs

Date Taken	Amount

	Yes	No
Do you have additional Meals and Entertainment costs?		

Meals

Date Taken	Amount

	Yes	No
Do you have additional Meals costs?		

Equipment

Date Taken	Amount

	Yes	No
Do you have additional Equipment costs?		

Travel & Lodging

Date Taken	Amount

	Yes	No
Do you have additional Travel costs?		

Office Supplies

Date Taken	Amount

	Yes	No
Do you have additional Office Supply costs?		

Other Costs

Date Taken	Amount

	Yes	No
Do you have additional costs?		

Sales of Stocks, Bonds,
Mutual Funds and Other Securities

Is the brokerage account in the name of this Corporation?.....

Yes

No

If no, skip this section

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					
G					
H					

Do you have more sales?.....

Yes

No

Sale of Real Estate

2022

Enclose copies of Form(s) 1099-S & CLOSING STATEMENTS HUD-1'S FOR ALL PURCHASES, SALES, AND REFINANCINGS.

	Description	Date Acquired	Date Sold	Sale Price	Cost Basis	Type of Property
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						

If the sold properties have been depreciated as prior rentals please provide all depreciation schedules.

RENTAL "REAL ESTATE" PROPERTY AND ROYALTY INCOME: ATTACH HUD-1'S FOR ALL PROPERTY PURCHASES & REFINANCINGS IN 2015

	Description of Property & Complete Property Address (ex: Single family, Duplex, Condo, or Commercial)	Date Property Became Available	Rents Received	Royalties Received
A				
B				
C				
D				

Expenses

Property A

Expense	Amount	Expense	Amount
Auto (Used for Rental Properties)		Advertising and Promotion	
Cleaning and Maintenance		Commissions	
Insurance		Legal and Professional Fees	
Mortgage Interest		Management Fees	
Points Purchase/Refinancing		Repairs (over \$250, itemized below)	
Real Estate Taxes		Utilities	
Meals		Other Expenses (List on Last Page)	

Property B

Expense	Amount	Expense	Amount
Auto (Used for Rental Properties)		Advertising and Promotion	
Cleaning and Maintenance		Commissions	
Insurance		Legal and Professional Fees	
Mortgage Interest		Management Fees	
Points Purchase/Refinancing		Repairs (over \$250, itemized below)	
Real Estate Taxes		Utilities	
Meals		Other Expenses (List on Last Page)	

Expenses Continued →

Expenses Continued

Property A			
Expense	Amount	Expense	Amount
Auto (Used for Rental Properties)		Advertising and Promotion	
Cleaning and Maintenance		Commissions	
Insurance		Legal and Professional Fees	
Mortgage Interest		Management Fees	
Points Purchase/Refinancing		Repairs (over \$250, itemized below)	
Real Estate Taxes		Utilities	
Meals		Other Expenses (List on Last Page)	

Property B			
Expense	Amount	Expense	Amount
Auto (Used for Rental Properties)		Advertising and Promotion	
Cleaning and Maintenance		Commissions	
Insurance		Legal and Professional Fees	
Mortgage Interest		Management Fees	
Points Purchase/Refinancing		Repairs (over \$250, itemized below)	
Real Estate Taxes		Utilities	
Meals		Other Expenses (List on Last Page)	

Assets For Depreciation

Rental Asset Worksheet: Complete for all rental assets purchased. List any repairs, furnishings and appliances over \$2,500.

	Property ID	Date Purchased	Asset	Price	Date Sold (if applicable)	Sale Price
A						
B						
C						
D						
E						
F						

Do you have more sales?

Yes

No

Tax Payments

Federal Estimated Tax Payments for Tax Year 2022

	Date Paid	Amount Paid
1st Quarter		
2nd Quarter		
3rd Quarter		
4th Quarter		

State Estimated Tax Payments for Tax Year 2022

	Date Paid	Amount Paid
1st Quarter		
2nd Quarter		
3rd Quarter		
4th Quarter		

Additional Information or Comments?