AvantiPRO
110 Crown Oak Centre Dr
Longwood, FL 32750
MyCPA@AvantiPRO.com
phone: 407.331.7330

Thank you for downloading! Tax season is upon us. Changes in tax forms and tax code have become the norm, but we have you covered. There are some additional documents needed to complete your return, additional forms we will review and potential changes in the upcoming budget bill in congress. We will be utilizing the following procedures for this year's tax processing:

- Your tax organizer follows this page and is a fillable PDF. If you would like a paper copy mailed to you, please call the AvantiPRO office.
- You may send in your completed tax organizer and tax documents online via the online portal, drop them off, or mail to the AvantiPRO office. If you are a new client, please call the AvantiPRO office to schedule your drop off appointment/call with Cathie. We are also offering specials for new clients*.

  * Please see ***AvantiPRO.com/special-offers*** for all of our 2023 promos!
- Questions and updates will be handled via email or a scheduled phone call.
- All tax return delivery meetings will be conducted face-to-face at the AvantiPRO office, online via Zoom, or by phone call.

The following documents have been prepared to assist you in gathering information for your return:

- Tax Organizer – please respond to all the questions as there are new items the IRS is requiring and the questions may remind you of items needed for this year. If you would like a fillable, electronic copy, please call the AvantiPRO office or download from AvantiPRO.com.
- Checklist – list of documents needed to prepare your 2022 return including items that may be new this year.
- Engagement letter – please sign and return along with your completed tax organizer and documents in order for us to begin working on your return.
- Terms and Conditions Addendum - uploaded to the AvantiPRO portal and is available on the website.

Special notes for 2022 tax preparation:

- 1099K - There are new reporting requirements and you may receive forms from Venmo, PayPal, Facebook and other platforms. **ALL RECEIPT FORMS** have to be reported properly to minimize the tax affect or determine tax does not apply.
- Digital assets continue to be a focus of the IRS. Please let us know of any holdings or transactions in virtual currency, i.e., bitcoin, ethernet, dogecoin, etc., and non-fungible tokens, i.e. digital pictures.

We appreciate your trust and look forward to seeing you. Please feel free to contact us at 407-331-7330 if you have any questions or need additional information.

Sincerely,

Cathie D. Mannion

Cathie Mannion CPA MBA EA
AvantiPRO

2022 Tax Organizer
Personal Information

Personal Information

	Name	SSN	Has IP PIN	Date of birth
Taxpayer			☐	
Spouse			☐	

Name of person to whom all information should be addressed, if not the taxpayer

Street address, city, state, and ZIP

	Occupation	Daytime phone	Evening phone	Cell phone
Taxpayer				
Spouse				

Taxpayer email	
Spouse email	

Filing status at the end of 2022

☐ Single ☐ Married ☐ Widowed - If widowed and your spouse died in 2022, enter the date of death ______

☐ Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2022? ______

Yes	No	
☐	☐	Are you or your spouse blind?
☐	☐	Are you or your spouse disabled?
☐	☐	Are you or your spouse a full-time student?
☐	☐	Do you or your spouse want to designate $3 to go to the Presidential Election Campaign Fund?
☐	☐	At any time during 2022 did you: (a) receive (as a reward, award, or payment for property or service) a digital asset (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)

Identification Information

Taxpayer's type of photo ID

☐ Driver's license ☐ State-issued photo ID

Photo ID number ______

State photo ID was issued ______

Date photo ID was issued ______

Date photo ID expires ______

Spouse's type of photo ID

☐ Driver's license ☐ State-issued photo ID

Photo ID number ______

State photo ID was issued ______

Date photo ID was issued ______

Date photo ID expires ______

Account Information for Deposits and Withdrawals

Name of bank	Bank routing number	Bank account number	Type of account		Use this account for	
			Checking	Savings	Deposits	Withdrawals
			☐	☐	☐	☐
			☐	☐	☐	☐

Appointment Information

Your 2022 appointment is scheduled for ______

Dependent and Other Information

Name: SSN:

Dependent Information

First and last name SSN	Has IP PIN	Relationship	Months in home	Date of birth	Disabled	Full-time student	Childcare Expenses
	☐				☐	☐	
	☐				☐	☐	
	☐				☐	☐	
	☐				☐	☐	
	☐				☐	☐	

List dependents required to file a return ______

Child and Other Dependent Care Expenses

Name of care provider	Address	SSN or EIN	Amount Paid

Estimates

	Federal		Resident State		Resident City	
	Date paid	Amount	Date paid	Amount	Date paid	Amount
Overpayment applied from 2021						
First quarter						
Second quarter						
Third quarter						
Fourth quarter						
Additional payments						

Questionnaire

Name: SSN:

Questionnaire

Personal Information

Yes No

☐ ☐ Did your marital status change during the year?
If "Yes," explain ____

☐ ☐ If your filing status is married, but you are filing separately from your spouse, did you and your spouse live apart for the last six months of 2022?

☐ ☐ Can you or your spouse be claimed as a dependent by someone else?

☐ ☐ Did your address change during the year?

☐ ☐ Were you, your spouse, or any dependents a victim of identity theft?
If "Yes," explain ____

☐ ☐ Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
If "Yes," provide Notice CP01A from the IRS.

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

Dependent Information

Yes No

☐ ☐ Did you have any changes in dependents during the year?
If "Yes," explain ____

☐ ☐ Can another person qualify to claim any of your dependents?

☐ ☐ Did you have any childcare expenses during the year?

☐ ☐ Did you have any adoption expenses during the year?

☐ ☐ Did you have any children under age 19 or a full-time student under age 24 with more than $2,300 of unearned income?

Provide documentation for proof of dependent credits (school records, medical records, daycare records, etc.)

Health Care Information

Yes No

☐ ☐ Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?
If "Yes," provide copies of Form 1095-A.

☐ ☐ Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

Income, Purchases, Sales, and Debt Information

Yes No

☐ ☐ Did you receive any tips not reported to your employer?

☐ ☐ Did you receive any disability income during the year?

☐ ☐ Did you cash in any U.S. savings bonds during the year?

☐ ☐ Did you start a new business or purchase any rental property during the year?

☐ ☐ Did you sell an existing business, rental property, or other property during the year?
If "Yes," provide documentation.

☐ ☐ Did you purchase any business assets or convert any assets to business use?
If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage.

☐ ☐ Did you purchase any gasoline, diesel, or special fuels for off-road business use?

☐ ☐ Did you buy or sell any stocks, bonds, or other investments during the year?

☐ ☐ Did you sell a principal residence during the year?
If "Yes," provide closing documentation for the purchase and sale of the home, including the HUD statement.

☐ ☐ Did you have a principal residence or a piece of real property foreclosed on during the year?

☐ ☐ Did you abandon a principal residence or a piece of real property during the year?

☐ ☐ Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing, and other pertinent documentation and information, including HUD closing statement.

Questionnaire

Name: SSN:

Questionnaire

☐ ☐ Did you receive any principal or interest during this year from property sold in prior years?
☐ ☐ Did you rent out your home or use it for business?
☐ ☐ Did you sell, exchange, or purchase any real estate during the year?
☐ ☐ Did you acquire a new or additional interest in a partnership or S corporation?
☐ ☐ Did you have any debts canceled or forgiven this year?
☐ ☐ Does anyone owe you money that has become uncollectible?
☐ ☐ Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?
If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service.
☐ ☐ Did you receive income or incur expenses associated with a fantasy sport league?
If "Yes," provide documentation.
☐ ☐ Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?
If "Yes," attach Form 1099-MISC, Form 1099-NEC, or Form 1099-K.
☐ ☐ Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?
If "Yes," attach Form 1099-MISC, Form 1099-NEC, 1099-K or Form W-2.
☐ ☐ Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?
If "Yes," provide documentation.
☐ ☐ Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?
If "Yes," attach Form 1099-K.
☐ ☐ Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)?
If "Yes," provide documentation.
☐ ☐ Did you receive income or incur expenses as an independent contractor (e.g., Shipt, Instacart, DoorDash)?
If "Yes," attach Form 1099-MISC, Form 1099-NEC, or Form 1099-K.
☐ ☐ Did you receive any other income you have not provided information for with this organizer?
If "Yes," explain ____

Itemized Deduction Information

Yes No

☐ ☐ Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
☐ ☐ Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
☐ ☐ Did you receive any state or local income tax refunds from prior years?
☐ ☐ Did you make any major purchases (vehicle, boat, etc.) during the year?
☐ ☐ Did you pay any real estate property taxes or personal taxes during the year?
☐ ☐ Did you pay mortgage interest during the year?
☐ ☐ Did you make cash donations to charity during the year?
☐ ☐ Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
☐ ☐ Did you use your vehi ______________________
☐ ☐ Did you donate a boat or vehicle during the year?
If "Yes," attach Form 1098-C.
☐ ☐ Did you have gambling winnings or losses during the year?
☐ ☐ Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safety equipment, etc.)?
☐ ☐ Did you use your vehicle on the job other than for commuting to work?
☐ ☐ Did you work out of town at any time during the year?

Retirement Information

Yes No

☐ ☐ Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
☐ ☐ Did you make any withdrawals or receive distributions from a pension or profit sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
☐ ☐ Did you execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?

Questionnaire

Name: SSN:

Questionnaire

☐ ☐ Did you receive any Social Security benefits during the year?

Education Information

Yes	No	
☐	☐	Did you pay tuition and other expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
☐	☐	Did anyone in your household attend a post-secondary school during the year?
☐	☐	Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
☐	☐	Did you pay student loan interest for yourself, your spouse, or your dependents during the year? If "Yes," provide the amount of interest that was refunded.
☐	☐	Did you receive forgiveness on a qualifying federal student loan?

Foreign Tax Information

Yes	No	
☐	☐	Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
☐	☐	Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
☐	☐	Did the aggregate value of your foreign accounts exceed $10,000 at any time during the year?
☐	☐	Did you have any income from, or pay taxes to, a foreign country?
☐	☐	Did you receive a Schedule K-3 from a partnership or S corporation?
☐	☐	Did you own property in a foreign country?

Refund, Withholding, and Estimated Tax Information

Yes	No	
☐	☐	If you have an overpayment of 2022 taxes, do you want the refund applied to your 2023 estimated taxes?
☐	☐	Did you make any estimated payments toward your 2022 taxes?
☐	☐	Did you apply an overpayment of your 2021 taxes to your 2022 estimated taxes?
☐	☐	Do you want to have any refund or balance due directly deposited or withdrawn? If "Yes," provide a canceled checking or savings slip.
☐	☐	Do you anticipate your income or withholdings to be different for 2023?

Miscellaneous Information

Yes	No	
☐	☐	Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset. i.e. bitcoin, ethenet, dogecoin, non-fungible tokent (NFT) or financial interest in any digital asset?
☐	☐	Did you incur a gain or loss (including expenses) due to damaged or stolen property, while living in a federally declared disaster area? Note: Hurricanes Ian and Nicole are included. If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.
☐	☐	Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
☐	☐	Did you make gifts to any one person in excess of $16,000 during the year? Yes No ☐ ☐ If "Yes," are you splitting the gift with your spouse?
☐	☐	Did you incur moving expenses with the military during the year?
☐	☐	Did you make any energy-efficient improvements to your main home during the year?
☐	☐	Are you a business owner who paid health insurance premiums for your employees during the year?
☐	☐	Do you own interest or shares in or did you dispose of a Qualified Opportunity Fund during the year?
☐	☐	Did you make any purchases subject to Use Tax during the year? If "Yes," provide details.
☐	☐	Did you receive any notices from the IRS or state taxing authority? If "Yes," provide copies of notice and details.
☐	☐	May the IRS discuss your tax return with your preparer?
☐	☐	Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?

Schedule C - Profit or Loss from Business

Name: SSN:

General Business Information

TS _____ Professional product or service ______________________ Employer ID number ______________

Business name ______________________________

Business address, city, state, ZIP ______________________________

Accounting Method: ☐ Cash ☐ Accrual ☐ Other (specify) ______________

☐ This business started or was acquired during 2022. ☐ This business was disposed of during 2022.

Select if this business is for:

☐ Professional gambler
☐ Exempt Notary income
☐ Newspaper delivery and you are under 18 years of age
☐ A clergy

Yes	No	
☐	☐	Payments of $600 or more were paid to an individual, who is not your employee, for services provided for this business.
☐	☐	If "Yes," did you file Forms 1099 for the individuals?
☐	☐	You received a Paycheck Protection Program (PPP) loan for this business.
☐	☐	If 'Yes," was any portion of the loan forgiven?

Income

	2022		2022
Gross receipts or sales		Other income	
Returns & allowances			

Expenses

	2022		2022
Advertising		Repairs & maintenance	
Car & truck expenses		Supplies	
Commissions & fees		Taxes & licenses	
Contract labor		Travel	
Depletion		Total meals	
Employee benefit programs		Utilities	
Insurance (other than health)		Wages	
Interest - mortgage		Family health coverage payments for taxpayer, spouse or dependents	
Interest - other		Other expenses (list)	
Legal & professional services			
Office expenses			
Pension & profit sharing plans			
Rent or lease (vehicles, machinery, & equipment)			
Rent (other business property)			

Cost of Goods Sold

	2022		2022
Inventory at beginning of year		Materials & supplies	
Purchases		Other costs	
Cost of personal use items		Inventory at end of year	
Cost of labor		☐ There was a change in inventory method.	

Schedule E - Income or Loss from Rental Real Estate & Royalties

Name: SSN:

General Property Information

TSJ _____
Property description ____________________

Address, city, state, ZIP ____________________

Select the property type

- ☐ Single family residence
- ☐ Multi-family residence
- ☐ Vacation / short-term rental
- ☐ Commercial
- ☐ Land
- ☐ Royalties
- ☐ Self-rental
- ☐ Other ____________________

Number of days property was rented ______________ Number of days property was used for personal use ______________

If the rental is a multi-dwelling unit and you occupied part of the unit, enter the percentage you occupied ______________

- ☐ This property was placed in service during 2022.
- ☐ This property was disposed of during 2022.
- ☐ This property is your main home or second home.
- ☐ This property was owned as a qualified joint venture.

Yes	No	
☐	☐	Payments of $600 or more were paid to an individual, who is not your employee, for services provided for this rental.
☐	☐	If "Yes," did you file Forms 1099 for the individuals?

Income

	2022		2022
Rent income		Royalties from oil, gas, mineral, copyright or patent	

Expenses

	Rental unit expenses	Rental <u>and</u> homeowner expenses
Advertising		
Auto & travel		
Cleaning & maintenance		
Commissions		
Insurance		
Legal & professional fees		
Management fees		
Mortgage interest		
Other interest		
Repairs		
Supplies		
Taxes		
Utilities		
Depletion		
Other expenses		

If this Schedule E is for a a multi-unit dwelling and you lived in one unit and rented out the other units, use the "Rental and homeowner expenses" column to show expenses that apply to the entire property. Use the "Rental unit expenses" column to show expenses that pertain ONLY to the rental portion of the property.

If the Schedule E is not for a multi-unit property in which you lived in one unit, complete just the "Rental unit expenses" column.

Expenses Related to Business

Name: SSN:

Auto Expense

Name of business vehicle is used for ______

Description of vehicle ______ Date vehicle was placed in service ______

Yes	No		Yes	No	
☐	☐	Was this vehicle available for use during off-duty hours?	☐	☐	Do you have evidence to support your deduction?
☐	☐	Was another vehicle is available for personal use?	☐	☐	If "Yes," is the evidence written?

Mileage

Number of miles the vehicle was driven during 2022

Business: Before July 1, 2022 ______ Commuting ______

After June 30, 2022 ______ Other ______

Expenses

Garage rent	______	Repairs	______
Gas	______	Tires	______
Insurance	______	Tolls	______
Licenses	______	Lease addback	______
Oil	______	Other expenses	
Parking fees	______	______	______
Rental fees	______	______	______
Interest	______	______	______
Property tax	______	______	______

Business Use of Home

Name of business home is used for ______

What is the total square footage of your home that was used regularly and exclusively for business? ______

What is the total square footage of your home? ______

For daycare facilities not used exclusively for business, complete the following questions

How many days during the year was the area used? ______

How many hours per day was the area used? ______

☐ The daycare facility was in operation for the entire year

Expenses	Office expenses	Home expenses
Mortgage interest	______	______
Real estate taxes	______	______
Excess mortgage interest	______	______
Excess real estate taxes	______	______
Insurance	______	______
Rent	______	______
Repairs & maintenance	______	______
Utilities	______	______
Other expenses	______	______

In the "Office expenses" column, enter those expenses that pertain exclusively to your office; in the "Home expenses" column, enter those expenses that pertain to the entire dwelling.

Schedule A - Itemized Deductions

Name: SSN:

Medical and Dental Expenses

Health insurance premiums (paid by you, not through work) . . . . ____

Amount that is for Medicare premiums . . . . ____

Long-term care premiums (you) . . . . ____

Long-term care premiums (your spouse) . . . . ____

Long-term care premiums (dependents) . . . . ____

Mileage driven for medical purposes

Before July 1, 2022 . . . . ____

After June 30, 2022 . . . . ____

Out of pocket medical & dental expenses

Doctor, dental, etc . . . . ____

Prescription medicines . . . . ____

Glasses & contacts . . . . ____

Hearing aids . . . . ____

Medical equipment & supplies . . . . ____

Hospital services . . . . ____

Laboratory services . . . . ____

Nursing services . . . . ____

Other ____ ____

Taxes Paid

State and local income taxes . . . . ____

General sales tax (vehicle, boat, home, etc.) . . . . ____

Real estate taxes . . . . ____

Personal property taxes . . . . ____

Auto registration taxes not deductible for state . . . . ____

Other taxes (list) ____ ____

____ ____

____ ____

Interest Paid

Home mortgage interest paid (attach Form 1098) . . . . . ____

☐ Some of your home mortgage loan was not used to buy, build, or improve your home.

Home mortgage interest paid to an individual . . . . ____

Paid to:

Name ____

Address ____

City, State, ZIP ____

SSN or EIN ____

Points not reported on Form 1098 . . . . ____

Investment interest . . . . ____

Charitable Contributions

Donations to charity	Cash	Noncash	Amount
Church	☐	☐	____
Boy or Girl Scouts	☐	☐	____
Goodwill	☐	☐	____
Red Cross	☐	☐	____
Salvation Army	☐	☐	____
United Way	☐	☐	____
Veterans	☐	☐	____
Hospital	☐	☐	____
University	☐	☐	____
Other ____	☐	☐	____

Miles driven for charitable purposes . . . . ____

Other Miscellaneous Deductions

Amortizable bond premiums . . . . ____

Federal estate tax . . . . ____

Gambling losses . . . . ____

Impairment-related work expenses . . . . ____

Claim repayments . . . . ____

Unrecovered pension investments . . . . ____

Loss from other activities from Schedule K-1 . . . . ____

Ordinary loss debt instrument . . . . ____

Excess deduction on termination . . . . ____

Job Expenses & Certain Miscellaneous Deductions

Necessary job expenses you paid that were not reimbursed by your employer

Safety equipment, tools, & supplies . . . . . . ____

Uniforms . . . . ____

Protective clothing (shoes, hardhats, glasses, etc.) ____

Dues to professional organizations . . . . ____

Books & subscriptions . . . . ____

Other ____ ____

Union dues . . . . ____

Tax preparation fees . . . . ____

Other nonpersonal expenses related to taxable income

Safe deposit box fees . . . . ____

Investment expenses not entered elsewhere . . ____

Other ____ ____

Home equity interest . . . . ____

AvantiPRO
110 Crown Oak Centre Dr
Longwood, FL 32750

Thank you for choosing AvantiPRO to assist you with your 2022 taxes. This letter summarizes the services that we will provide you, and the responsibilities you have for preparation of your tax return. A detailed **Terms and Conditions Memorandum,** dated December 20, 2022, which fully describes the terms of our agreement with you, has been placed into the AvantiPRO client portal. Those terms and conditions are adopted and incorporated by reference into this engagement letter and govern our agreement. Please read that memorandum before signing this engagement letter.

Tax Return Preparation

- We will prepare your 2022 federal and state tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include accounting services
- Fees charged for tax return preparation include limited assistance and consultation during the year but do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- The engagement to prepare your 2021 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid when your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.A retainer is required for preparation of late returns.

Thank you for the opportunity to be of service. Please date and execute this Agreement and return it to us to acknowledge your acceptance. We will not initiate services until we receive the executed Agreement. We appreciate your confidence in us.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (407)331-7330.

Sincerely,

Cathie D. Mannion
Cathie D. Mannion CPA MBA EA
AvantiPRO

Accepted By: *(Both spouses must sign for preparation of joint returns)*

Taxpayer	Date	Spouse	Date
Printed		Printed	

AvantiPRO
110 Crown Oak Centre Dr
Longwood, FL 32750
MyCPA@AvantiPRO.com
phone: 407.331.7330

We value you as our client, and your privacy is important to us. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Please read our privacy policy below.

We collect nonpublic personal information about you from various sources, including the following:

- Interviews regarding your tax situation;

- Applications, organizers, or by other means, such as your name, address, telephone number, social security number, number of dependents, income, and other tax-related data;

- Tax-related documents you provide that are required to process tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions, etc.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to nonpublic personal information concerning you, except to employees who need access to such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

If you have any questions about our privacy policy, please contact us.

Sincerely,

Cathie D. Mannion

Cathie D. Mannion, CPA, MBA, EA
AvantiPRO