

ROBERT HALL & ASSOCIATES

A Division of Montecito Financial Services, Inc.
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January 2009

Dear Client:

As we once again approach our busiest time of the year, we would like to take this time to remind you that your Partnership, Limited Liability Company, or Corporation 2008 Income Tax Returns will soon be due. In most cases, these returns should be completed before we can complete your personal returns.

Please complete the enclosed organizer for your business if you do not have a Computerized Profit & Loss Statement.

Very shortly, our office will be inundated with appointments for Individual Income Tax Returns. In order to serve you better, we have set aside special appointment times and extended our hours for those of you with businesses whose fiscal year ends between **October 31 and December 31**. Contacting us now assures you that we will have ample time to communicate with you, and provide you with the best service and accuracy. Most importantly, an early appointment will allow us time to give the lowest tax liability that the new laws provide. You should also keep in mind that sales tax returns, payroll tax returns, and W-2's and 1099's are due by **January 31, 2009**.

With this in mind, it is important that you have an appointment to prepare your 2008 business tax returns before **January 31, 2009**. We have extended our hours for your convenience, so please call us as soon as possible to make an appointment.

We want to thank you again for choosing Robert Hall & Associates to prepare your returns, and hope you call us soon so that we can complete your Partnership or Corporation return before January 31, 2009.

Sincerely,

Robert W. Hall, EA

Stephen Hall, EA

P.S. Let us know if we can help you. There have been changes to the tax laws, so call us immediately if you have any questions.

Client's Name:	
Business Name:	
FEIN:	

2008

STATEMENT P

Partnership Organizer

Business Address:		Business Activity (Including Product or Service)	
City, State, Zip		Accounting Method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other	
Fiscal year: From: _____ To: _____		Inventory Method: <input type="checkbox"/> Cost <input type="checkbox"/> Lower C/M <input type="checkbox"/> Other	
Gross Receipts/Total Income		Legal & Professional Fees	
Returns & Allowances		Licenses & Permits	
Beginning Inventory		Meals & Entertainment	
Purchases		Office Expense	
Cost of Items for Personal Use		Outside Services	
Cost of Labor		Parking & Tolls	
Materials & Supplies		Pension & Profit Sharing Plans	
Other Costs		Postage	
Ending Inventory		Printing	
Accounting		Refuse Disposal	
Advertising		Rent - Machinery / Equipment	
Amortization (Bring Schedule)		Rent - Other Business Property	
Answering Service		Repairs	
Bad Debt		Security & Safety	
Bank Service Charge		Storage	
Car & Truck Expenses		Supplies	
Collection Expense		Taxes - Business	
Commissions		Taxes - Payroll	
Delivery / Freight		Taxes - Property	
Depreciation (Bring Schedule)		Taxes - Other	
Dues / Publications		Telephone	
Education Expense		Theft / Casualty	
Employee Benefit Programs		Tools	
Gifts		Travel - Airfare	
Guaranteed Payments		Travel - Lodging	
Insurance - Auto		Travel - Meals	
Insurance - Other		Travel - Other	
Interest - Auto		Uniforms	
Interest - Mortgage		Utilities	
Interest - Other		Wages & Salaries	
Janitorial Service		Other (Please List):	
Laundry & Cleaning			
Lease - Equipment			
Lease - Auto			

Partnership Partners' Information

	Partner's Name	Partner's Address	Social Security # Or FEIN	P & L %age	General or Limited
Partner No. 1					
Partner No. 2					
Partner No. 3					
Partner No. 4					

Partners' Other Information - Please Identify	Partner No. 1	Partner No. 2	Partner No. 3	Partner No. 4
Capital contributed by partner				
Loans made to the partnership				
Loan made to the partner				
Guaranteed Payments made to the partner				

Partnership's Assets Information

Equipment/Capital Item Purchased Or Sold	Date	Purchase Price	Selling Price
Year End Bank Account Balance:	\$		

Auto / Truck Expense Information

	Vehicle No. 1	Vehicle No. 2
Date placed in service		
Make		
Purchase Price		
Total miles driven during the year		
Business miles driven during the year		

Notes & Comments
