Bliss & Skeen

Certified Public Accountants
2407 Pacific Avenue Suite C
Olympia, Washington 98501
(360)754-5848

PRIVACY POLICY

RE: Our Privacy Policy, Compliance with the Gramm-Leach-Bliley Act, Public Law 106-102 (FTC 16 CFR Part 313)

The privacy of your client information has always been important to us, and we have always been bound by professional standards of confidentiality. However, we are now required by law to formally inform you of our privacy policy.

We collect nonpublic personal information about you that is provided by you or obtained by us with your authorization. This information may come from various sources, including information we receive from personal interviews, tax organizers, worksheets, and other documents necessary to provide professional services to you.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted or required by law, or when necessary to process transactions requested by a client.

This is to inform you that information between Bliss & Skeen, CPA's may be shared with Bliss Investments & Wealthcare, Inc., a brokerage firm offering securities and investment management through Linsco/Private Ledger, Inc. Patricia Bliss, the owner, was a former owner of Bliss and Skeen, CPA's and may be familiar with your private information. Bliss Investments & Wealthcare, Inc. also has a privacy policy, which requires specific permission from you before any information is released to any organization other than these two.

We restrict access to nonpublic personal information about you to members of our firm who need to know that information in order to provide you professional services. We retain records relating to the professional services that we provide you in accordance with accounting and government standards.

We employ physical, electronic, and procedural security safeguards to protect your nonpublic personal information.

Your confidence and trust are important to us. If you have any questions or concerns regarding the privacy of your nonpublic personal information, please contact us.

______________________________ __________________
Client Signature Date

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ENGAGEMENT LETTER

This letter is to confirm our understanding that you wish to have us prepare your Individual tax return.

We will prepare your tax return based upon information which you furnish us. We will not audit nor verify the information that you provide. We will use our professional judgment in preparing your tax returns. Whenever we are aware that applicable tax law is unclear or that there are conflicting interpretations of the law by authorities, e.g. tax agencies and courts, we will discuss with you our knowledge and understanding of the possible positions which may be taken on your return. We are not attorneys, however, and cannot provide you with legal opinions or analyses of these positions. We will adopt whatever position you request on your return so long as it is consistent with our professional standards and ethics. If you desire a legal opinion before choosing between alternative tax positions, then you should retain legal counsel for this purpose. If the Internal Revenue Service should later contest the position(s) taken and included in your tax returns, there may be an assessment of additional tax liability for any such additional assessments. Remember, you have ultimate responsibility for the income tax return and should review it carefully before you sign it.

Our engagement cannot be relied upon to detect errors, irregularities, or illegal acts, including fraud or defalcations, that may exist.

Your account is entirely confidential. Prior to releasing any information regarding your account, we will obtain approval from you. Please refer to our attached privacy policy regarding the sharing of information between Bliss & Skeen, CPA's, and Bliss Investments and Wealthcare, Inc. Providing your account is current, information from our files can be copied upon request with your approval. There is a 10 cents per page and $25 per hour charge for such copying. Also, we may incur and therefore will bill you a storage retrieval cost of $25.00 per box. We will keep your records in storage for a period of 7 years, after which time your records will be destroyed.

Our fee for this engagement will be based on the complexity of the issues and the time required of the individuals who will be performing the services. Our invoices are payable upon the receipt of the billing for work-in progress or when you pick up your tax return, whichever is sooner. Any costs for special mailings such as FedEx or Certified Mail will be billed separately.

After filing, your returns are subject to review by the tax authorities. Any items which may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of any tax examinations, we will be available to represent you, and will render additional invoices for such services.

Since the annual returns will be predicated upon the current tax law, we do not consider ourselves responsible for future changes in the law which affect the return already prepared. Such changes may require the amendment of prior-filed tax returns. We will render additional invoices for all such services at our customary billing rates upon your request for services.

It is agreed that all disputes which arise in connection with our engagement and which result in litigation shall be submitted to arbitration under the Mandatory Arbitration Rules of the Superior Court of Washington and any local mandatory arbitration monetary limitation on the applicability of such arbitration rules is expressly waived. The client agrees that BLISS & SKEEN'S liability hereunder for damages, regardless of the form of action shall not exceed the total amount paid for services. This shall be the client's exclusive remedy. The client further agrees that employees of BLISS & SKEEN will not be liable for any lost profits, or any claim or demand against the client by any other party. No action, regardless of form, arising out of the services under this agreement, may be brought by either party more than one year after the cause of action has incurred, except that an action for non-payment may be brought within three years of the date of last payment.

By your signature below, you are confirming to us that unless we are otherwise advised, your travel, entertainment, gifts and related expenses are supported by the necessary records required under the Internal Revenue Code, and that your business use of joint-use property, such as computers and vehicle, is substantiated by a log of such use so as to preclude the deduction any personal expenses which may be related to such property. If you have any questions as to the type of records required, please ask us for advice in that regard.

Pursuant to the Omnibus Reconciliation Act of 1989, the provisions of the new Section 6662 call for penalties against tax payers for substantial understatement of tax - more than 10% of the tax shown on the return or $5,000, whichever is greater. This penalty will be assessed unless the taxpayer can show that there was "substantial authority" for any position that was ultimately disallowed or that there was "adequate disclosure" in the return of any conflict between an IRS position and that taken by the taxpayer. You agree to advise us if you wish such disclosure to be made in your returns or if you desire us to identify or perform further research with respect to any material tax issues for the purpose of ascertaining whether, in our opinion, there is "substantial authority" for the position proposed to be taken on such issue in your returns. There may be some situations where our professional ethics and/or the tax laws require us to disclose a tax return position. Where this occurs and is a material consideration for you, we will inform you of this requirement and its consequences.

If the above fairly and correctly sets forth your understanding of our services, please sign, date and bring this agreement to your tax appointment.

P.S. Per our insurance company, THIS FORM MUST BE SIGNED BEFORE WE CAN PROVIDE ANY TAX SERVICES.

Accepted by:

____

Client Signature

____

Date

2010
TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name		Last name	
First name		First name	
Middle Initial	Suffix	Middle Initial	Suffix
Social security number		Social security number	
Date of birth		Date of birth	
Occupation		Occupation	
Work phone	Ext	Work phone	Ext
Cell phone		Cell phone	
E-mail address		E-mail address	

Address .... ______ Apartment number ..... ______

City .... ______ State .... ______ ZIP Code .... ______

Home phone ..... ______ Fax number .... ______

Dependent Information

First name / Last name	MI / Suffix	Social Security Number / Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Student First Name	MI	Suffix	Student Last Name	Social Security Number

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2010 qualified student loan interest .... ______

Attach Form(s) W-2 — Wages, Salaries, Tips and Other Compensation

Employer Name	2009 Amount

Attach Form(s) 1099-R — Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	2009 Amount

Attach Form(s) SSA-1099 — Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099		
Railroad Retirement Benefits from Form RRB-1099		
Medicare B premiums withheld		
Medicare D premiums withheld		

Attach Form(s) 1099-MISC — Miscellaneous Income

1099-MISC Payer Name

Attach Form(s) 1099-INT — Interest Income

1099-INT Payer Name	2009 Amount

Attach Form(s) 1099-DIV — Dividend Income

1099-DIV Payer Name	2009 Amount

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G — Certain Government Payments, Schedule K-1s — Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G — Gambling or Lottery Winnings, Form(s) 1099-Q — Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

	Taxpayer	Spouse
Traditional IRA contributions made for 2010		
Roth IRA contributions made for 2010		
SEP, Keogh, Individual 401(k) or SIMPLE Contributions		

Medical and Dental Expenses

	2010 Amount	2009 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses:		

Taxes

	2010 Amount	2009 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses

Home mortgage interest paid — Attach Form(s) 1098.

Lender's Name	2010 Amount	2009 Amount

Points paid on loan to buy, build or improve main home

Lender's Name	2009 Amount

Cash/Check/Credit Contributions

	2010 Amount	2009 Amount

Noncash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Miscellaneous Deductions

	2010 Amount	2009 Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		

		Yes	No
1	Did you receive an economic stimulus payment in 2010? You may have received this payment in 2010 if you did not receive a payment in 2009 and you received social security benefits, supplemental security income, railroad retirement benefits, or veterans disability compensation or pension benefits in November or December 2008, or January 2009. Report the amount here ________	☐	☐
2	Did a lender cancel any of your debt in 2010? (Attach any Forms 1099-A or 1099-C)	☐	☐
3	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2010? If **yes,** please attach details	☐	☐
4	Did you purchase a motor vehicle or boat during 2010? If **yes,** attach documentation showing sales tax paid.	☐	☐
5	Did you purchase a hybrid vehicle in 2010? If **yes,** enter year, make, model, and date purchased: ________	☐	☐
6	Did you donate a vehicle in 2010? If **yes,** attach Form 1098C	☐	☐
7	What was the sales tax rate in your locality in 2010? ________ % State ID ____		
8	Did your marital status change during 2010? If **yes,** explain: ________	☐	☐
9	Were you or your spouse permanently and totally disabled in 2010?	☐	☐
10	Do you have dependents who must file?	☐	☐
11	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $1900?	☐	☐
12	Did you provide over half the support for any other person during 2010?	☐	☐
13	Did you incur adoption expenses during 2010?	☐	☐
14	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
15	Did you receive any disability payments in 2010?	☐	☐
16	Did you receive tip income **not** reported to your employer?	☐	☐
17a	Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2010? If **yes,** attach closing or escrow statements, 1099-C or 1099-A forms.	☐	☐
b	Did you enter into a binding contract to purchase a new home by April 30, 2010?	☐	☐
c	If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?	☐	☐
18	Did you incur any casualty or theft losses during 2010?	☐	☐
19	Did you incur any non-business bad debts?	☐	☐
20	Did you pay any individual for domestic services in 2010?	☐	☐
21	Did you buy or sell any stocks or bonds in 2010?	☐	☐
22	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
23	Did you incur any moving expenses? If **yes,** attach details	☐	☐
24	Did you or your spouse elect continuation of COBRA coverage after your employment was involuntary terminated?	☐	☐
25	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
26	Do you expect your income and deductions in 2011 to be the same as 2010? If **no,** attach explanation of changes expected.	☐	☐
27	If you paid any alimony, enter recipient's SSN: ________ Alimony paid: ________		
28	Enter your state of residence **Taxpayer** ________ **Spouse** ________		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

If **yes,** please provide a voided check (not a deposit slip) if your bank account information has changed.

What type of account is this? Checking ☐ Savings ☐

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

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__ Births	__ Move to Washington	__ Refinance real estate
__ Adoptions	__ Rental property	__ Long term care ins. premiums
__ Marriages	__ Estate	__ Assisted living/Nursing home exp.
__ Divorces	__ Trust	__ Estate > 3,500,000
__ Deaths	__ S-Corp	__ Inheritances
__ Live apart from your spouse	__ LLC	__ Household employees
__ Unemployment compensation	__ Partnership	__ Gifts exceeding $13,000 / person
__ Installment contracts	__ Debts: Canceled or forgiven	
__ College: Family member attend	__ Own an Annuity	

__ Did you have an interest in or signature authority over a bank account in a Foreign Country?

__ Did you start a business this year? If yes, please call and request the Small Business Worksheet.

__ Do you give IRS permission to talk to us about questions on your return if you receive IRS correspondence?

__ Do you wish to designate a part of your taxes to the Presidential Campaign Fund? Was $3 in 2009.

__ Did you do a 2010 Roth Conversion?

__ Do you have any of the following mortgage interest?
- __ Motor home or boat
- __ 2nd home
- __ Home equity

__ Would you like a free review of your investment portfolio by Bliss Investments for a 2nd opinion.

__ Would you like to receive Bliss Investment's monthly financial e-mail? E-Mail Address: __________________

Let us help if you are involved in any of the following:		
Need Financial/Investing planning	Operating a small business	Investing Stocks or Bonds
Buying/Selling/Exchanging rental	Planning retirement	Contemplating divorce
Buying/Selling a small business	Estate Planning	Trust Accounting
Received inheritance	Executor of Estate or Trust	