REFERRAL COUPON ($15)

SEND A FRIEND!

BLACS

P.O. Box 201
Columbia, MD 21045
www.bottomlineacs.com
taxes@bottomlineacs.com
Phone: 443.283.1735
Tax Fax: 443.320.9866

Not redeemable for cash

Your Name:

Friend's Name:

Expires: April 15, 2012

Send this completed coupon along with your 2011 tax information and receive a $15 discount on your 2011 individual income tax return fees and receive a $15 check for each paying client you refer to us.

Word of mouth is our single biggest source of new clients. If you are already a BLACS client, you know that we are committed to providing you with the highest quality service. Our Referral Program merges these two concepts together in a way that benefits our clients, their friends, and us.

Referral Program Details

Our referral program is simple: for every new paying client you refer to us, we will send you a $15 check. Not only that, but as an incentive for your friends, we give them $15 off their tax fees. Just print out these referral coupons, write your name on them, and pass them out to your friends along with the link for the Personal Tax Organizer or simply email this coupon and copy me (taxes@bottomlineacs.com) so that I will have a record of your referrals.

Our referral program is just another way to show how much we value our clients. If you have any questions, feel free to contact us at anytime.

Tax Preparations

At Bottom Line Accounting & Consulting Services, the client always comes first. We don't close up and disappear after tax season; we are open 12 months a year, as our clients have needs all throughout the year.

Tax Preparations – Instructions

To assure prompt filing of your tax return, please follow these steps:

1. Please complete ALL applicable items on the Tax Organizer.

2. After completing the online Tax Organizer you need to fax, e-mail or send by normal mail one copy of your W-2(s) and/or 1099(s) forms

    - Our tax fax number is 443-320-9866
    - Our other fax number is 443-283-8046.
    - taxes@bottomlineacs.com
    - IRS requires that we have your W-2s and/or 1099s before e-filing your tax forms.

    If you are in Columbia, Md. area, we can arrange for pickup and delivery of your tax materials. We ask for a 24 hour notice.

3. Provide your e-mail address, home and work telephone numbers, so if we have any questions, we can contact you.

4. If we have not previously prepared your returns - please provide a copy of last year's tax returns. We will also require a non-refundable $50 down payment before we can begin your preparing your taxes. The $50 will be applied to your total fees.

5. After we have received your tax organizer forms and your scanned or faxed W-2/1099 forms, we will complete your return.

6. Once completed, we will send you a summary for your review showing the amount of your refund or the amount of tax you will owe. The actual return will be sent to you once payment has been made to Bottom Line Accounting and cleared through PayPal.

7. Upon receiving your forms you must fax or e-mail back the signature pages so that we can transmit your tax return to the federal and state government agencies.

Tax Organizer

First Name & Initial	Last Name	Social Security No.
Taxpayer		
Spouse		

Check if:

Occupation	Age on 12/31	65 or over	Bind	Dependent of Another	Presidential Election Contrib

Street Address		Phone Res:	
City, State, Zip		Phone Work:	

Filing Status: ___ 1-Single 2-Married, filing joint 4-Head of Household 5-Qualifying Widow/Widower

Dependent Information

Name (first, initial, and last name)	Date of Birth	Social Security No.	Relationship	Months in home

Wages and Salaries

Employer Name	Wages	Federal Tax Withheld	FICA Withheld	Medicare Withheld	State Tax Withheld	Local Tax Withheld

Business and Investment Questions

Please check if "Yes" and provide documentation if possible.

	Did you receive stock from a stock bonus plan with your employer?
	Did you buy or sell any bonds?
	Did you surrender any U.S. Savings bonds
	Did you suffer a casualty, theft or condemnation?
	Did you start a business, purchase rental property or farm, or acquire interests in partnerships or S-Corporations?
	Did you own any investments for which you were not personally "at-risk"?
	Did you own any interest in a Real Estate Mortgage Investment Conduit (REMIC)?
	Did you sell any property or equipment on installment?
	Did you incur any business-related educational expenses?
	Did you incur any travel and entertainment expenses?
	Did you purchase any specials fuels for non-highway use?
	Did you own a diesel-powered vehicle?

Other Income	Prior Year Amount	Current Year Taxpayer	Current Year Spouse
Taxable refunds of state and local income taxes			
Alimony received			
Business income or (loss) – Schedule C			
Other gains or (losses) – Form 4797			
Total IRA distributions			
Total pensions and annuities			
Rents and Royalties, S Corps, partnership – Schedule E			
Farm income or (loss) – Schedule F			
Unemployment compensation			
Total social security benefits			
All other income – not provided for above			
Tips			
Child care taxable benefits			
Prizes (1099-Misc)			
Scholarship and fellowships			

Adjustments to Income	Prior Year Amount	Current Year Amount
Your IRA deduction		
Spouse's IRA deduction		
Moving Expenses		
Self-employed SEP, SIMPLE, and qualified plans		
Penalty on early withdrawal of savings		
Alimony paid		

Child or Dependent Care Expenses – Paid to:

Name	Address	Social Security or ID Number	Amount Paid

Itemized Deductions	Prior Year Amt	Current Year Amt
Medical and dental expenses		
Real estate taxes		
Personal property taxes		
Home mortgage interest and points reported on Form 1098		
Home mortgage interest not reported on Form 1098 Name: Address: SSN:		
Home mortgage points not reported on Form 1099		
Investment interest paid		
Gifts to charity by cash or check		
Gifts to charity other than by cash or check		
Mileage driven to charitable activities		
Casualty and theft losses – Form 4684		
Unreimbursed employee expenses		
Travel expenses (exclude meals)		
Meals and entertainment		
Parking and tolls		
Telephone used for employer's business (allocate cost)		
Professional organization or union dues		
Educational expenses required to maintain your job		
Office in home required by employer		
Tools and equipment		
Safety and protective clothing		
Uniform costs		
Professional journals subscriptions		
Job seeking costs		
Other		
Other expenses		
Investment expresses		
Tax preparation fees		
Safe deposit box rental		
Other		
Other miscellaneous deductions		

Estimated Taxes and Other Taxes Paid

		Federal		State	
	Due Date	Date Paid	Amount	Date Paid	Amount
Applied From Prior Year's Refund					
First Quarter Estimated Tax	April				
Second Quarter Estimated Tax	June				
Third Quarter Estimated Tax	Sept				
Fourth Quarter Estimated Tax	This Jan				
Other Tax Payments					

Vehicle Information and Expenses	Vehicle One	Vehicle Two
Description of vehicle		
Is the vehicle used in a business or by an employee?		
Cost (including Sales Tax)		
Date placed in service		
Business Miles		
Commuting miles (daily commuting miles times the number of trips to work)		
Other personal use miles		
Total miles driven		
Gas and oil expenses		
Repairs and maintenance		
Auto insurance		
Registration, Licenses, and Fees		
Other auto expenses (identify)		
Auto rentals		

Auto Mileage Documentation	Yes	No
Is another car available for personal use?		
Do you have evidence to support your mileage information report above?		
If "Yes", is the evidence written in a log or other place?		

Income or Loss from S Corporations

Name	Income	Loss	Other Expenses	Passive (Yes/No)

Income or Loss from Partnerships

Name	Income	Loss	Other Expenses	Passive (Yes/No)

Income or Loss from Trust

Name	Income	Loss	Other Expenses	Passive (Yes/No)

Self Employed Business Income and Expenses

Name of Business (A)				
Address of Business (A)				
Name of Business (B)				
Address of Business (B)				
	Business A		Business B	
	Prior Year	Current Year	Prior Year	Current Year
Gross Receipts or sales				
Returns and allowances				
Inventory at beginning of year				
Cost of merchandise purchased				
Cost of labor				
Materials and supplies				
Other costs				
Inventory at end of year				
Advertising				
Bad debts from sales or services				
Car and truck expenses				
Commissions and fees				
Depletion				
Depreciation				
Employee benefit programs				
Insurance (not health)				
Mortgage interest				
Other interest				
Legal and professional services				
Office expense				
Pension and profit-sharing plans				
Rent or lease: machinery/equipment				
Rent or lease: other business property				
Repairs and maintenance				
Supplies				
Taxes and licenses				
Travel				
Meals and entertainment				
Utilities				
Wages				
Other:				

Other (cont.)				
New equipment purchases (Description, date purchased, etc.):				

Income or Loss from Rentals and Royalties

Address of Property A						
Address of Property B						
Address of Property C						
	Property A		Property B		Property C	
Was property used for personal purposes for more than the greater of 14 days or 10% of the total days rented at fair rental value?	Yes or No		Yes or No		Yes or No	
Total rents received						
Total royalties received						
Advertising expenses						
Auto and travel						
Cleaning & maintenance						
Commissions						
Insurance						
Legal & professional fees						
Management fees						
Mortgage interest paid						
Other interest						
Repairs (list below)						
Supplies						
Taxes						
Utilities						
Other:						
New equipment & improvement (description, cost and date)						

General Questions

Please check if "Yes" and provide documentation if possible.

	Did your marital status change?
	Were you notified by the IRS of changes to a prior year's return?
	Are you being claimed as a dependent by another person?
	Were there any changes in dependent information from the prior year?
	Did you have any children under the age of 14 who received more that $1,500 in investment income?
	Do you have dependents who are neither U.S. Citizens nor U.S. Residents?
	Did you provide over half of the support for another person (or persons) during the year?
	Did you sell or purchase a principal residence?
	Did you receive payments from a pension or profit sharing plan?
	Did you receive any distributions from an IRA or other qualified plan?
	Did you receive any disability income?
	Did you receive any foreign income or pay any foreign taxes?
	Did you receive interest from a bank account or other financial account based in a foreign country?
	Were you the grantor of or transferor to a foreign trust?
	Did you pay nondeductible dues to an association that was involved in political lobbying?
	If you or your spouse are self-employed, are either of you covered under an employer's health plan at another job?
	Did you incur any non-business bad debts?
	Did you receive proceeds from an installment sale made to relatives?
	Did you make a loan at an interest rate below market rate?
	Did you make gifts of over $10,000 to an individual?
	Were there any changes to a prior year's income, deductions, or credits that would require filing an amended return?
	Did your employer pay premiums on life insurance in excess of $50,000?

Business and Investment Questions

Please check if "Yes" and provide documentation if possible.

	Did you receive stock from a stock bonus plan with your employer?
	Did you buy or sell any bonds?
	Did you surrender any U.S. Savings bonds
	Did you suffer a casualty, theft or condemnation?
	Did you start a business, purchase rental property or farm, or acquire interests in partnerships or S-Corporations?
	Did you own any investments for which you were not personally "at-risk"?
	Did you own any interest in a Real Estate Mortgage Investment Conduit (REMIC)?
	Did you sell any property or equipment on installment?
	Did you incur any business-related educational expenses?
	Did you incur any travel and entertainment expenses?
	Did you purchase any specials fuels for non-highway use?
	Did you own a diesel-powered vehicle?