

# Chuck Sloan & ASSOCIATES

NEW ADDRESS!

14120 Magnolia Blvd North Hollywood CA 91423

818 769-2291 Email: [staff@chucksloan.com](mailto:staff@chucksloan.com)

[www.chucksloan.com](http://www.chucksloan.com)

**PARTNERSHIP, S-CORP, C-CORP,  
SINGLE OR MULTI-MEMBER LLC  
TAX PACKET**

## NEW CLIENTS:

Please bring your incorporation documents from the IRS and your state of incorporation.

These are not required for returning clients.

## BOTH RETURNING AND NEW CLIENTS:

Please bring your prior year tax return, W-2's, 1099's and any other forms sent to your corporation noted as tax related. If you use Quicken, Quickbooks etc., or use an accountant to keep your books, please bring a balance sheet and profit and loss statement.

*Please fill in total amount spent on any applicable items:*

<b>GROSS INCOME</b>	\$
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## EXPENSES/DEDUCTIONS:

<b>1. Accounting</b>	\$
<b>2. Amortization</b>	\$
<b>3. Automobile and Truck Expense</b>	\$
<b>4. Bank Charges</b>	\$
<b>5. Cleaning</b>	\$
<b>6. Commissions</b>	\$
<b>7. Computer Services and Supplies</b>	\$
<b>8. Credit and Collection Costs, Bad Debt</b>	\$
<b>9. Delivery and Freight</b>	\$
<b>10. Discounts</b>	\$
<b>11. Dues and Subscriptions</b>	\$
<b>12. Equipment Rent</b>	\$

<b>13. Gifts</b>	\$
<b>14. Insurance</b>	\$
<b>15. Janitorial</b>	\$
<b>16. Laundry and Cleaning</b>	\$
<b>17. Legal and Professional</b>	\$
<b>18. Meals and Entertainment</b>	\$
<b>19. Miscellaneous</b> <i>(Please Itemize on Separate Sheet)</i>	\$
<b>20. Office Expense</b>	\$
<b>21. Outside Services / Independent Contractors</b>	\$
<b>22. Parking Fees and Tolls</b>	\$
<b>23. Permits and Fees</b>	\$
<b>24. Postage</b>	\$
<b>25. Printing</b>	\$
<b>26. Security</b>	\$
<b>27. Supplies</b>	\$
<b>28. Telephone</b>	\$
<b>29. Tools</b>	\$
<b>30. Training and Education</b>	\$
<b>31. Travel</b>	\$
<b>32. Uniforms</b>	\$

<b>33. Utilities</b>	\$
<b>34. Total Farm Expenses</b>	\$
<b>35. Officer Compensation</b>	\$
<b>36. Employee Salaries</b>	\$
<b>37. Payroll Taxes</b>	\$
<b>38. Employee Benefits</b>	\$
<b>39. Pension/Profit Sharing</b>	\$
<b>40. Office Rental</b>	\$
<b>41. Taxes</b>	\$
<b>42. Interest</b>	\$
<b>43. Repairs and Maintenance</b>	\$
<b>44. Advertising &amp; Publicity</b>	\$
<b>45. Equipment or Furniture</b> <i>(Itemize w/ Purchase Dates on Separate Page)</i>	\$
<b>46. Beginning Inventory at January 1</b>	\$
<b>47. Inventory Purchases</b>	\$
<b>48. Ending Inventory at December 31</b>	\$
<b>OTHER</b>	\$
<b>OTHER</b>	\$
<b>OTHER</b>	\$
<b>OTHER</b>	\$

**ESTIMATED TAX PAYMENTS:**

**FEDERAL**

**STATE**

<b>1ST QTR</b>	\$	\$
<b>2ND QTR</b>	\$	\$
<b>3RD QTR</b>	\$	\$
<b>4TH QTR PAID CURRENT YEAR OK</b>	\$	\$

**NEW Appointment Location!!**

**14120 Magnolia Blvd.**

**Sherman Oaks 91423**

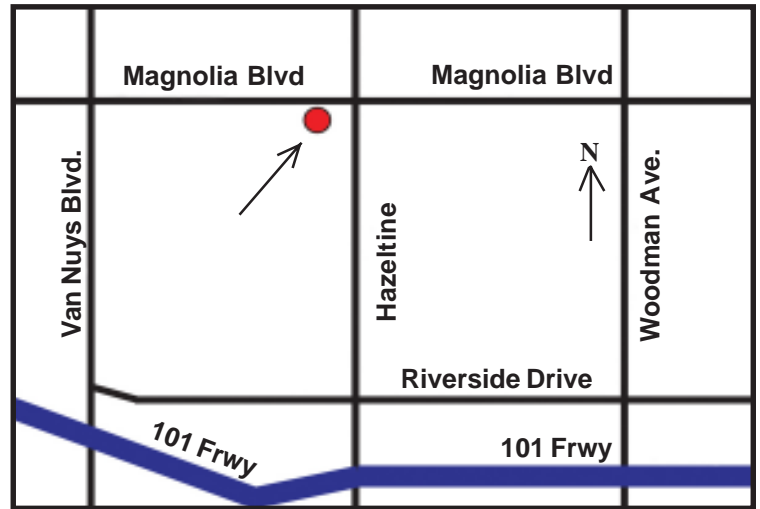
Free Street Parking and in the lot  
**BEHIND** our building  
 (Warning: Do NOT park in  
 Dentist office next door)

**Three Miles WEST of our OLD location**

**Just West of Hazeltine (Between Woodman and Van Nuys)**

**on South Side of Street**

**Two Doors West of AFTRA-SAG Credit Union Sherman Oaks Branch**



**Directions from Hollywood:**

Take 101 Frwy. North to Woodman Ave. Turn Right going North. At Magnolia turn Left and go past Hazeltine to 14120 Magnolia Blvd.

**Through Canyons:**

Follow Laurel Canyon or Coldwater Canyon NORTH (through hills) to Magnolia Blvd. Turn Left and go past Hazeltine to 14120 Magnolia Blvd.

**From the Glendale/Pasadena:**

Take 134 West to 101 North. Continue North to Woodman Ave. Turn Right going North. At Magnolia turn Left and go past Hazeltine to 14120 Magnolia Blvd.

**From Santa Monica/West LA:**

Take 405 North to the 101 South and exit on Van Nuys Blvd. Turn Left at the off-ramp and go North to Magnolia Blvd. Turn Right to 14120 Magnolia Blvd.

*Stephanie Griffin*

*Michael Campbell*

*Jordana Capra*

*Lamont Dixon*

*Chuck Sloan*

*Joe Howard*

*Daphne McVay*

*Tricia Lee Pascoe*

*Ryan Shaughnessy*

*Ronnie Steadman*

*Marta Sullivan*

*Lindsay Thompson*

*Brice Williams*

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## ENGAGEMENT OF SERVICES AGREEMENT

Client Name (s) \_\_\_\_\_ Date \_\_\_\_\_

**This letter is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide.**

We will prepare your Federal Income tax return and income tax returns for the states of \_\_\_\_\_, with supporting schedules, and perform related research as considered necessary (herein after known collectively as the “returns”).

This engagement pertains only to the tax year \_\_\_\_\_, and our responsibilities do not include preparation of any other tax returns that may be due to any taxing authority. A similar letter/contract will be issued and signed for any other tax years wherein you choose to engage this firm. Our engagement will be complete upon the delivery of the completed returns to you. Thereafter, unless the process of electronic filing is appropriate, you will be solely responsible to file the returns with the appropriate taxing authorities.

We will furnish you with our tax packet to guide you in gathering and understanding the necessary information required for your tax preparation. Your thorough completion and use of these forms provide for the most accurate return and assist us in keeping our fees to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will not audit or otherwise verify the data you submit. Accordingly, our engagement cannot be relied upon to disclose errors, fraud or other illegal acts that may exist in the information you have provided.

In addition to the information you have placed in the packet, or other papers you may provide, you further acknowledge that to the best of your knowledge and belief during the interview/preparation process you have provided accurate, complete and full disclosure in your answers to any and all questions regarding income, expenses, deductions and exemptions in an effort to ensure that your return is prepared accurately.

To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for the preparation of the returns and may lead to additional costs. Therefore, your commitment is essential to our ability to complete this engagement. Specifically, we must receive comprehensive information from which to prepare your returns within a reasonable period of time.

If, during our work, we discover information that affects your prior-year tax returns, we will make you aware of the facts. However, we cannot be responsible for identifying all items that may affect prior-year returns. If you become aware of such information during the year, please contact us to discuss the best resolution of the issue.

It is always possible your returns may be selected for review (audit) by one or more taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such tax examination(s), we will be available upon your written request to represent you during the examination and/or during any appeal for an additional fee.

You should retain all the documents, receipts, records, 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.

**Taxpayer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Spouse Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_