(Date)

(Client Name)

(Address)

Dear (Client):

Thank you for choosing [*FIRM NAME*] for your accounting, tax, and related needs. We will strive to maintain the confidence you have placed in our firm throughout our working relationship.

Enclosed is a copy of our firm’s PRIVACY POLICY for your consideration and records. If you have any questions regarding the privacy policy, do not hesitate to call our office.

In order to compile a complete file, please provide copies of the following documents by *[DATE]:*

[Select Necessary Items]

\_\_\_\_ From your corporate record book:

\_\_\_\_ Articles of Incorporation and Bylaws

\_\_\_\_ Minutes

\_\_\_\_ Stock register

\_\_\_\_ Partnership agreement

\_\_\_\_ Depreciation schedules

\_\_\_\_ Tax returns for the years ended \_\_\_\_\_\_, \_\_\_\_\_\_, and \_\_\_\_\_\_

\_\_\_\_ Financial statements for the years ended \_\_\_\_\_\_, \_\_\_\_\_\_, and \_\_\_\_\_\_

\_\_\_\_ Buy / sell agreement(s)

\_\_\_\_ Employment agreement(s)

\_\_\_\_ Lease agreement(s)

\_\_\_\_ Loan agreement(s)

\_\_\_\_ Tax elections and related approvals

\_\_\_\_ Copies of taxing authority audit reports

\_\_\_\_ Will

\_\_\_\_ Trust agreement

\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [other: specify]

\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [other: specify]

Thank you again for choosing [*FIRM NAME*]. We look forward to working with you. Should you have any questions or concerns regarding your account or the services provided by our firm, please contact our office.

Very Truly Yours,

(CPA)

Enclosure: PRIVACY POLICY