MISSIONARY INCOME TAX QUESTIONNAIRE 2010

DATE:	How did you hear about our company?	Time:	Interviewed by:	Initial preparer:

NAME

YOUR NAME: (If married, please list husband first)	YOUR SOCIAL SECURITY NO:	D / O / B:	ARE YOU OVER 65?	LEGALLY BLIND?	DECEASED?
SPOUSE'S NAME:	SPOUSE'S SOCIAL SECURITY NO:	D / O / B:	ARE YOU OVER 65?	LEGALLY BLIND?	DECEASED?

HOME PHONE NO:	CELL PHONE NO:	OFFICE PHONE NO:	E-MAIL ADDRESS:

ADDRESS

HOME ADDRESS:

ADDRESS FOR TAX RETURN, IF DIFFERENT:

FILING STATUS

ARE YOU SINGLE, MARRIED, MARRIED FILING SEPARATELY, HEAD OF HOUSEHOLD, OR WIDOWER?
Please circle one.

IF DIVORCED, GIVE DATE OF DIVORCE:

DEPENDENTS use separate paper for more - or use NOTES section

NAME OF DEPENDENTS CLAIMED AS EXEMPTIONS NAME (FIRST, INITIAL, AND LAST NAME)	RELATIONSHIP (ie. Son or Daughter)	DATE OF BIRTH	DEPENDENTS SOCIAL SECURITY NUMBER	NO. OF MONTHS IN THIS YEAR LIVED IN YOUR HOME	IS THIS CHILD A COLLEGE STUDENT? If so what year?	DID SOMEONE ELSE PROVIDE MORE THAN HALF OF THEIR SUPPORT?

OCCUPATION

YOUR OCCUPATION:	CURRENT EMPLOYER	IF STUDENT, WHAT YEAR IN SCHOOL: FRESHMAN, SOPHOMORE, JUNIOR OR SENIOR	TOTAL COLLEGE HOURS TAKEN	ACCOUNT SUMMARY FROM COLLEGE?
SPOUSE'S OCCUPATION:	CURRENT EMPLOYER	IF STUDENT, WHAT YEAR IN SCHOOL: FRESHMAN, SOPHOMORE, JUNIOR OR SENIOR	TOTAL COLLEGE HOURS TAKEN	ACCOUNT SUMMARY FROM COLLEGE?

GENERAL MISSIONARY QUESTIONS

What State are you a resident of?	Type of VISA?	Any additional income earned please explain in the notes section below:	Name of your missions board or sending agency?	
Date Foreign Residence began?	How Many days were you out of the U.S.A. in 2010? Provide dates below:	Amount contributed to an I.R.A.	Roth I.R.A.	Traditional I.R.A.

GENERAL/MINISTER QUESTIONS

If your date of birth is after 1992, do your parents claim you?	Y - N	
Are you a Home owner? Need mortgage Interest & RE tax statement	Y - N	
Did you purchase a home this year 2010? If so, We need the settlement statement of the buy and sell	Y - N	
DO YOU HAVE A 401K OR ANY RETIREMENT PLANS, or plan to contribute to an I.R.A. for the past tax year?	Y - N	
Do you have any unresolved prior tax issues?	Y - N	
Any major purchases like NEW auto, boats, etc...? If yes, please provide copies of the receipts	Y - N	
Did you declare a housing allowance?	Y - N	
If Yes, AMT $ Declared?	AMT $ Used?	Fair Rental $ Value
Do you live in a church furnished parsonage? If so, what is the fair rental value? FRV	Y - N	
DID YOU MAKE ANY ESTIMATED TAX PAYMENTS? PLEASE PROVIDE DATES & AMOUNTS BELOW	Y - N	
Did you pay any medical Insurance premiums out of pocket not payroll deducted?	Y - N	

If you worked out of state/country during the tax year:
State on W-2's — Dates of each residence/jobs

#1	state/country name	Date arrived in U.S.	Date Left U.S.	Income Earned in U.S. on Business
#2	state/country name	Date arrived in U.S.	Date Left U.S.	Income Earned in U.S. on Business
#3	state/country name	Date arrived in U.S.	Date Left U.S.	Income Earned in U.S. on Business

Have you opted out of Social Security? If so, please provide a copy of the IRS form 4361?	Y - N
Do you have signature authority for a foreign bank account? If yes, did the total balance exceed $10,000.? Total balance: $________________________	Y - N
Did you receive an auto allowance? If so how much?	Y - N
Pay our fees with your refund from your bank account? Additional fees apply $30.00	Y - N
Estimated Fees:	Estimated completion date:
Would you like your refund direct deposited if applicable? If yes, please attach a voided check or deposit slip	Y - N
If you receive SS, SSI, Veterans benefits, RR retirement, or Government retirees, did you receive the $250.00 stimulous pmt?	Y - N

In the event that I decide not to use the services of National Church and Clergy LLC - there will be a minimum charge of up to half the estimated fees. I have read and agree to the terms of the engagement letter on the back of this form or as an additional page. **All out of state or country tax returns will receive their final return in a .pdf format via email.**
We recommend Adobe reader 7.0 or higher for reviewing files - This is a free download - For fill out forms use Adobe Standard 7.0 or higher

Signature:	**All fees must be paid for prior to e-filing**
Spouse's Signature:	*Contact our office for password information*

NOTES:

1410 E. Kearney St Ste D
Springfield, MO 65803

Income Tax Preparation and Consulting Engagement Letter

We are pleased to provide you with professional services. This engagement letter embodies the entire agreement regarding the services to be rendered by our firm for you. This will confirm our understanding of the professional services to be rendered by our firm for you.

We will perform income tax services or consultation, based upon information you provide. It is your responsibility to provide us with true, correct, and complete information required to complete the engagement. Our engagement cannot be relied upon to disclose errors, fraud, or other illegal acts that may exist. However, we will inform you of any material errors, fraud, or other illegal acts that come to our attention, unless they are clearly inconsequential. In addition, we have no responsibility to identify and communicate significant deficiencies or material weaknesses in your internal control as part of this engagement.

As a result of this engagement we will issue income tax returns. Our firm is not responsible for disallowed deductions or the inclusion of additional unreported income, or any resulting taxes, penalties or interest assessed. Our liability for all claims, damages, and costs you incur related to this engagement is limited to the total amount of fees paid by you to us for services rendered under this agreement. You agree to hold us harmless from any and all claims which arise from knowing misrepresentations or the intentional withholding or concealment of information. You also agree to indemnify our firm for any claims made against our firm by third parties which arise from any of these actions.

We will provide you with an organizer, upon request, to help you gather and document the information we will need to prepare your tax returns. It is your obligation to use the tax organizer to gather the necessary documents. You should retain all documents that provide evidence and support for your reported income and deductions on your returns. You may need to provide these documents to a taxing authority to substantiate the accuracy and completeness of the returns. You will prepare and supply all supporting documentation required to the aforementioned procedures prior to the preparation of the documents. These records will remain your property and will be returned to you upon issuance of the reports and tax forms. It is your responsibility to maintain and preserve these records. Our records and files are our property and are not a substitute for your records. Our firm destroys our client files and all pertinent work papers after a retention period of three years, after which time these items will no longer be available. Catastrophic events or physical deterioration may result in our firm's records being unavailable.

We will provide services to you as you request them. You authorize us to accept instructions from yourself or your designee and we may rely upon the instructions we receive as being your instructions. Customer satisfaction is an important aspect of our service. If, during the course of the engagement, you would like to discuss, change, or expand the services we have agreed to perform, you agree to contact Leslie Wilson at this office, who is in charge of your engagement.

We will commence work for you when you provide us with the information. It may become necessary to apply for an extension of the filing deadline if there are unresolved tax issues or delays in processing, or if we do not receive all of the necessary information from you on a timely basis.

Our fees for these services will be billed at our standard hourly rate of $100 per hour for each of our employees as well as reimbursement for out-of-pocket costs incurred in order to complete the engagement. Travel time will be billed at our standard rate as well. Specialized CPA work like OIC, IRS issues and IRS letters will be up to $160 per hour. If we encounter situations that require us to devote substantially more time to the engagement than budgeted or if staff with different qualifications are required, we will contact you in advance and provide to you a revised estimate of our professional fees.

Payment is due at the time services are rendered. All returned checks will be resubmitted to your bank electronically for the face amount of the check. The return check service fee of $25 will also be submitted to your bank electronically by either electronic check or ACH. We reserve the right to suspend or terminate our work in the event we do not receive timely payment of our billing statements. A $25 service charge will be added if the statement is not paid by the designated time noted on the statement. This suspension or termination of our work may cause you to fail to meet deadlines or may result in other adverse consequences and is a proper consequence of nonpayment of our statements. Our firm does report to national credit reporting agencies and may turn over any uncollected debts to an attorney of which the debtor will be responsible for any legal fees and court costs. A minimum fee of half the estimate will be charged in the event the tax return is picked up prior to completion.

We will prepare your returns based on your filing status (single, married filing jointly, married filing separately, head of household, etc.) as reflected in your income tax returns for last year. If your marital status has changed or you want to change your filing status, please contact us immediately.

Our engagement does not include tax planning services, which are available as a separate engagement. This engagement does not include responding to inquiries by any governmental agency or tax authority. If your tax return is selected for examination or audit, you may request that we assist you in responding to such inquiry for an additional fee.

Federal, state and local taxing authorities impose various penalties and interest charges for non-compliance with tax law. You, as the taxpayer, remain responsible for the payment of all taxes, penalties, and interest charges imposed by taxing authorities. The law also imposes a substantial penalty on taxpayers and preparers for failure to disclose "reportable transactions." Reportable transactions are potentially abusive transactions identified by the IRS whose primary purpose is tax avoidance. You agree that it is solely your decision to disclose any reportable transactions in the returns that we prepare for you. You agree to pay all fees and expenses incurred to date if you do not permit us to complete the returns.

You may request that we perform additional services not contemplated by this engagement letter. If this occurs, we will communicate with you regarding the scope and estimated cost of these additional services. Engagements for additional services may necessitate that we issue a separate engagement letter to reflect the obligations of both parties, and may also require a retainer fee before additional work can be done. In the absence of any other written communications from us documenting such additional services, our services will be governed by the terms of this engagement letter.

In the unlikely event that circumstances occur which we, in our sole discretion, believe could create a conflict with either the ethical standards of our firm or the ethical standards of our profession in continuing our engagement, we may suspend our services until a satisfactory resolution can be achieved, or we may resign from the engagement. We will notify you of such conflicts as soon as practicable, and will discuss with you any possible means of resolving them prior to suspending our services.

In the event that we receive a subpoena or summons requesting that we produce documents from this engagement or testify about the engagement, we will notify you prior to responding to it if we are legally permitted to do so. You may, within the time permitted for our firm to respond to any request, initiate such legal action as you deem appropriate to protect information from discovery. If you take no action within the time permitted for us to respond or if your action does not result in a judicial order protecting us from supplying requested information, we may construe your inaction or failure as consent to comply with the request.

Parties to this engagement agree that any dispute that may arise regarding the meaning, performance, or enforcement of this engagement will, prior to resorting to litigation, be submitted to mediation upon the written request of any party to the engagement. All mediations initiated as a result of this engagement shall be administered by the American Arbitration Association (AAA). The results of this mediation shall be binding only upon agreement of each party to be bound. Cost of any mediation proceeding shall be shared equally by both parties. We appreciate the opportunity to be of service to you. Please date and sign the income tax questionnaire to acknowledge your agreement with the terms of this engagement.

Privacy Policy

As tax preparers, we have always protected your right to privacy. Like all providers of personal financial services, we are now required by law to inform our clients of our policies regarding privacy of client information. We do not outsource our services overseas like many other companies and would notify you in advance if we were to change this policy.

*** Types of Nonpublic Personal Information We Collect:**
We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. We may also video and audio record some conversations that may be used to help us in identifying and confirming information about you. By signing below you also authorize the firm to randomly video record conversations.

*** Parties to Whom We Disclose Information:**
For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law unless you give verbal permission to release info to a third party or a financial institution of your choice for obtaining a bank loan or filling out a FAFSA (Additional fees may apply). Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared**. (Additional forms may be needed for specific authorization)**

*** Protecting the Confidentiality and Security of Current and Former Clients' Information:**
We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality services are very important to us.

Filer's Signature	Date	Spouse's Signature	Date

<u>Debit or Credit Card Payment</u>

National Church & Clergy, LLC

Cardholder Name:

Card Number:

Amount:

Expiration Date:

Security Code:

Address Numbers:

Zipcode:

Invoice #:

Cardholder acknowledges receipt of services in the amount of the total shown hereon and agrees to perform the obligations set forth in the cardholder's agreement with the issuer.

Cardholder's Signature: