Hello,

Thanks for contacting me regarding accounting services. (now for the blah, blah, blah, I’ll only bore you with it once!)

An accountant is a business partner who provides you with the advice and services you need at an economical price. Simmons Accountancy is very well positioned to service entrepreneurs such as yourself. Because of my extensive work with entrepreneurial businesses and my experience with clients in the service, wholesale, and retail industries, I believe Simmons Accountancy will be able to meet your business and personal requirements to your complete satisfaction. This letter provides information about the cost of my services, my professional background, as well as the business philosophy of my practice.

**Professional Services**

I have provided professional services to individuals and entrepreneurial businesses most of my career. The services most frequently provided are:

⋅ Management advisory services;

⋅ Income tax planning and return preparation;

⋅ Accounting and bookkeeping;

⋅ Budget preparation and analysis;

⋅ Payroll calculation and payroll tax filings;

⋅ Preparation of financial statements;

Every individual and business has a unique character and a unique set of problems and resulting solutions. I work with my clients to design a specific service plan that will meet their needs.

**Basis of Professional Fees**

To gain a better insight to the operations of your business, I believe in hands-on involvement in all aspects of my work. Fees for the preparation of tax returns may be billed by tax form or at my regular hourly rates, depending on the return complexity. Other work is billed at my regular hourly rates of $145.00 per hour.

**My Professional Background**

I began my accounting career after graduation from San Francisco State University. I passed the CPA exam on my first sitting, a feat accomplished by less than 5% of the applicants. I then joined the "Big Eight" firm of Arthur Young, where I participated in audits of multi-national corporations, fraud and defalcation audits, as well as various consulting assignments. At a local San Francisco accounting firm, I was active providing accounting, management and computer consulting services to manufacturers and businesses engaged in providing professional services.

Throughout my career, I have honed my computer skills through hands-on experience and classroom instruction, so that I can now offer advanced computer consulting services in conjunction with or in addition to accounting related services. This has proven to be an advantage to businesses that are attempting to increase the reliability and usefulness of accounting data, or are contemplating a change in accounting software or hardware. I am especially well trained in operating Quicken and QuickBooks software product lines.

Through my experiences, I have developed a sound foundation from which to provide a variety of tax, management and computer related services. In 1988, I began practicing independently, providing services to individuals, small businesses, professional firms and non-profit organizations.

**Business Philosophy**

"Focused on the future" is the premise on which I provide services. My goal is not simply to provide accounting and tax services or to correct current problems, but to strive to provide sound guidance and advice so that my clients can meet the demands of today's and tomorrow's competitive environment. I emphasize personal interaction between me and my clients, and responsiveness in providing answers to my client's questions and solutions to their problems.

**List of Documents**

To initiate our professional relationship and to assure that I understand the structure of your businesses and your personal tax situations, please provide the following items:

1. Founding documents:

A. Articles of Incorporation (S, C or Non-profit Corporation); or

B. Articles of Organization (Limited Liability Company);

2. Bylaws;

3. IRS Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code;

4. Letters from the IRS and FTB approving non-profit status;

5. Letter from the IRS assigning Employer Identification Number;

6. Letter from the FTB assigning California entity number;

7. 2016 Business Tax Returns, both federal and state;

8. 2017 year-to-date financial statements for your business.

Please use my document transfer service listed below as it is more secure than email for sensitive information.

Below is my complete contact information. My office is substantially virtual and paperless, if you would like to physically meet we can make arrangements to meet at your home or place of business.

I’m looking forward to doing business with you.

Michael L. Simmons, CPA

Simmons Accountancy

FIN: 30-0012743

Email:

Michael@MLSimmons-CPA.com

Mailing Address:

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Secure Web-Based Document Transfer Service:

<https://spaces.hightail.com/uplink/Simmons-Accountancy>