

Georgia/Tennessee Newsletter 2010
(MEDTAX - Tax Year 2009)

medtax.net

Is a one stop web site for information to answer all your tax questions and needs. Familiarize yourself with all the sidebar links to a vast amount of practical information that may be beneficial to you. Consider printing a copy of this page to use as a reference to share with a potential referral. MEDTAX continues to grow each year as a result of my consistently faithful clients and their word-of-mouth referrals they make. You will notice 3 monetary opportunities I am giving back to you as a reward.

Rewards:

1. Free E-filing for full time high school and college age students. (Ages up to 21 years old)
2. Earn \$25 for referring a new adult paying client to me. (Up from \$20 last year)
3. Earn \$25 for opening a Wachovia checking account.

Grove Level Baptist Church:

Your first year I will give you free Federal and State E-filing. (\$50 value)

Hamilton Medical Center Associates:

Contact me at home rather than in the department.

Pricing Changes:

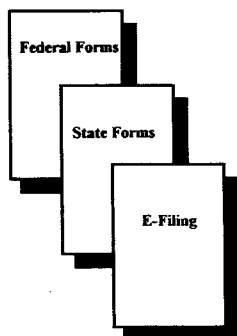
I will annually increase the return charge by \$5 and the E-filing by \$5. Most all other practices increase their charges by 5% annually, as a \$20-\$30 increase each and every year. They also charge per form, per document, and per certain line entries, I do not. I mostly charge a flat rate for each form. You will find that where I charge \$100, a local franchise will charge \$200, and a CPA will charge \$300, for the same work. Guide any potential referrals to the "Charge Estimator and Comparison" page, which will give them an opportunity to compare just exactly how much I will charge them, and how much I will save them.

Miscellaneous Charges:

1. \$5 charge for US Post Office delivery of tax records
2. \$10 charge for UPS/FEDEX delivery of tax records
3. \$5 charge for credit card processing
4. Pay no up front fees at all when E-filing

Fees are automatically deducted from your refund after it is direct deposited into your account.

Make sure you complete the enclosed quick interview form before you give me your tax records.



Thank you for your business!

Joni Janni

MEDTAX

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MEDTAX - Quick Interview Form - 2010
(PLEASE FILL OUT AND RETURN TO ME WITH YOUR TAX RECORDS)

Referred by: _____ Date: _____

Name(s): _____

Mailing Address: _____

Home Phone: _____, Cell Phone: _____

E-mail: _____, Alt E-mail: _____

Social Security #'s: _____, _____

Birth Dates: _____, _____

Filing Status: [MFJ] [MFS] [HOH] [S], Blind or Disabled - []Y []N, Self-Employed: []Y []N

Your Occupation: _____

Spouse Occupation: _____

Dependent(s) : _____, Birth Dates: _____

Relationship to Dependents: _____

INCOME:

W2's - []Y []N, Interest from Checking/Savings/Credit Union - []Y []N, State Refund - []Y []N

Retirement/Pension/Annuity - []Y []N, Unemployment - []Y []N, Social Security - []Y []N,

Any 1099 Forms - []Y []N, Sell Stocks/Bonds - []Y []N, Alimony/Child Support - []Y []N,

Business Income - []Y []N, Rental Income - []Y []N, Gambling Earnings - []Y []N,

OTHER - []Y []N _____

ADJUSTMENTS:

Teacher Expenses - []Y []N, Moving Expenses - []Y []N, Alimony/Child Support - []Y []N,

Receive Stimulus Check in 2009 - []Y []N, Education Expenses - []Y []N,

Unreimbursed Employee Expenses - []Y []N

CREDITS:

Itemize Last Year - []Y []N, Medical Expenses - []Y []N, Mortgage Interest - []Y []N,

Property Taxes - []Y []N, Tag Taxes - []Y []N, Contributions of Property - []Y []N,

Contributions of Money - []Y []N, Job Related Expenses - []Y []N,

Education Expenses - []Y []N, Pay Child Care - []Y []N, Buy/Sell a House in 2009 - []Y []N,

Pay Quarterly Taxes Last Year - []Y []N, Owe State Last Year - []Y []N,

Interested in E-Filing - []Y []N

No up front fees to pay, direct deposit in 8-14 days, vs: Up to 8 weeks by mail, fees due up front.

Checking/Savings Account #: _____

Routing # _____

Bank Name: _____

Mail to: Jim Farnes/MEDTAX, 4240 Country Way, Cohutta, GA, 30710

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