



PO BOX 757 – 12855 LAKE BLVD
LINDSTROM, MN 55045
PHONE: 651.257.2152 FAX: 651.257.4236

The time to file your 2011 Income Tax Return is fast approaching. Our family is entering our 42nd year in the tax and accounting business; we look forward to the opportunity to visit with you soon about 2011 and help you plan for future years as your trusted tax professionals. While we may be able to see you sooner, we recommend you call a week in advance of when you want your appointment. When you are ready to make your appointment, please call (651) 257-2152 to schedule your appointment.

It is with great sadness that we share that our father (Roger) was advised by medical professionals to retire in May 2011 after a series of medical setbacks. While the timing was unexpected, with Roger planning on this tax season being his last, we have committed resources and executed a plan to ensure your needs and expectations are met. We are confident that this change will be as transparent as when Roger sold the business to his sons (Chad and Cory) in 2009. Our Tax Professionals, Cory Lindgren, Chad Lindgren, and Colette Campbell will continue to be available to assist you with your tax preparation and planning services this year and beyond with combined experience in the business of over 30 years.

With Roger's retirement we are also planning to begin training in Ellie Peterson on the income tax interview and preparation process. Ellie will continue to serve as our year-round Accounting & Payroll Assistant, as she has since 2006, and is currently working on completing her Bachelor's Degree in Accounting. While she completes her degree, we are cultivating an environment to expand her role and career development within our company. We are using this tax season to train Ellie with plans for her to begin preparing tax returns for us in 2013. As a result, some of you may see Ellie at some point in the tax return process so she can become more familiar with each step of the process. We are all excited for the opportunity to be able to continue her growth at Lindgren & Associates in the years to come and hope you are as well.

For those of you that worked with Cory, Chad or Colette last year we are asking that you schedule your appointment with them again this year, if possible. For those of you that worked with Roger last year we are requesting that you schedule your appointment with Cory or Chad this year based on your availability. If you would like to see someone else other than who prepared your return for any reason please let us know at the time of scheduling your initial appointment. At times, it may be necessary for clients to transition to another current preparer to best match client needs with our tax professionals. If we request that you transfer to another tax professional and you prefer to stay with your current tax professional we will honor your request at all times. We are fortunate to have a family based business, and since our current tax professionals are siblings, you can be certain that we will all be here to serve you for the years to come. We often compare our client relationship to that of a doctor or dentist with their patients; once you find a doctor or dentist that you trust, have confidence in, and are comfortable with you tend to stick with them for the long haul.

Below is each tax professionals scheduled hours during the week this year:

Cory Lindgren:	9:00 – 8:30 Monday, Wednesday, Thursday, and Friday
Chad Lindgren:	6:00 – 9:00 Monday, Tuesday, Wednesday, and Friday
Colette Campbell:	6:30 – 9:00 Monday, Tuesday, and Thursday

Each tax professional will also be here from 9:00 – 5:00 on Saturday's.

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The following are our scheduled office hours for 2012:

January 1 – January 28 Tuesday – Friday: 9:00 to 5:00	January 29 – April 16 Monday – Friday: 9:00 – 8:30 Saturday: 9:00 – 5:00	April 17 – December 31 Tuesday – Friday: 9:00 to 5:00
We are also available outside our regular office hours upon request.		

Attached are our Privacy Policy and current year’s tax organizer. In addition to this letter, Privacy Policy, and Organizer, the following supplemental forms are available at www.lindgrentaxandaccounting.com:

- Engagement Letter
 - States our responsibilities to you as your tax preparer and your responsibilities to us as our client. This is signed annually.
- Small Business Self Employment Income and Expenses
- Partnership, C-Corporation, and S-Corporation Income and Expenses
- Farm Income and Expenses
- Farm Rental Income and Expenses
- Real Estate Income and Expenses (Rental Properties)
- Home Office Expense
- Installment Sale, Contract for Deed, or Sale to Related Party
- Home Sale
- TaxTips Newsletters – Tax updates and changes

Are you wondering how long to keep your tax returns and supporting documentation? We keep paper copies for 3 years (2008 and current if filed on time) after completion. We recommend you do this at a minimum; however, the recommended retention period is seven years (2004 and current if filed on time) or longer, especially for self employed individuals, businesses, farms, and rental property owners.

Looking for another way to keep up to date of important tax changes throughout the year? Look for us on Facebook and “Like us.” Starting in 2012 we will be posting weekly updates for important tax changes that have occurred during the week. We will also be posting tax advice regularly as well. For those of you that may not be on Facebook, this year we will be bringing back the TaxTips newsletters that we will be sending our quarterly via email. Please make sure we have your email address on file to receive this. If you do not have an email address and would like them mailed instead, please let us know.

In order to ensure that your return can be completed and filed by April 17, 2012 we are requesting that you drop off your information by April 7, 2012. If we receive your information after this date it may be necessary to file an extension. If you know you will need an extension filed, please let us know.

Even if you do not fill out the organizer completely or at all, we ask that you review it while gathering your information to help ensure you provide us with all the necessary information to complete an accurate income tax return. Please bring the organizer (even if not completed), worksheets, and all necessary documentation with to your appointment.

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Referral Discounts

If you know of someone that could benefit from us preparing their tax return, please give them the following coupon so you can receive a \$15.00 discount off your next income tax return that we prepare for each referral you have sent in. In turn they will also get a \$15.00 discount:

<p>Lindgren & Associates Lindgren Tax & Accounting, Inc. 12855 Lake Blvd – PO Box 757 Lindstrom, MN 55045 (651) 257-2152 www.lindgrentaxandaccounting.com</p>	<p>Lindgren & Associates Lindgren Tax & Accounting, Inc. 12855 Lake Blvd – PO Box 757 Lindstrom, MN 55045 (651) 257-2152 www.lindgrentaxandaccounting.com</p>
<p>I am proud to inform you that Lindgren & Associates is my income tax preparer. Bring this coupon with to your appointment to receive \$15.00 off your Income Tax Preparation.</p> <p>Individual Referred: _____ Referred By: _____</p>	<p>I am proud to inform you that Lindgren & Associates is my income tax preparer. Bring this coupon with to your appointment to receive \$15.00 off your Income Tax Preparation.</p> <p>Individual Referred: _____ Referred By: _____</p>

Do you know a business that is looking for tax preparation, bookkeeping, and/or payroll services? Refer the following services and we will also give you the discount listed if they use us for that service:

- Partnership/Corporate Income Tax Return Preparation \$50.00 Discount
- Bookkeeping and Reconciliation Services \$75.00 Discount
- Payroll Processing \$25.00 Discount
- Payroll Reports Preparation \$25.00 Discount

Please make sure they mention your referral or have them bring in the referral form below:

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<p>Lindgren & Associates can provide you with the following services:</p> <ul style="list-style-type: none"> - Business Tax Return Preparation - Bookkeeping and Reconciliation - Payroll Process and Report Preparation <p>Individual Referred: _____ Referred By: _____</p>	<p>Lindgren & Associates can provide you with the following services:</p> <ul style="list-style-type: none"> - Business Tax Return Preparation - Bookkeeping and Reconciliation - Payroll Process and Report Preparation <p>Individual Referred: _____ Referred By: _____</p>



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Private Policy Notice

What information do we collect?

We at Lindgren & Associates collect nonpublic personal information about you from the following sources:

- Information obtained from our website, including your name and email address.
- Information we have received from you on an application, tax preparation worksheet, and other documents that we are provided with that are used in the preparation of your income tax return, bookkeeping records, payroll reports and records, financial statements, and other forms.
- Information about your transactions with us or others.
- Information we may receive from a consumer reporting agency.

What do we use your information for?

Any of the information we collect may be used in the following ways:

- To perform services including, but not limited to, income tax preparation, income tax planning, bookkeeping, financial statement preparation, payroll processing, or payroll report preparation.
- To send out periodic emails, including newsletters and important reminders. If at any time you would like to unsubscribe from receiving future emails, we include an unsubscribe instructions with each email.
- Improve Customer Service

We will continue to adhere to the privacy policies and practices described in this notice if you become inactive.

How do we protect your information?

We restrict access to your personal information to those employees who need to know that information to provide our products and services to you. We maintain physical, electronic, and procedural safeguards to guard your nonpublic information.

Do we disclose information to outside parties?

We do not disclose any nonpublic personally identifiable information about you to anyone without your permission. This does not include trusted third parties who assist us in operating our website, conducting our business, or servicing you, so long as those parties agree to keep this information confidential, except as permitted by law. We may also release your information when we believe release is appropriate or necessary to comply with the law, enforce our policies, or protect ours or others rights, property, or safety.

Third Party Links

We may include links to other third party websites from our website that can assist you. These websites have separate and independent privacy policies. We therefore have no responsibility or liability for the content and activities of these linked websites. Nonetheless, we seek to protect the integrity of our website and welcome any feedback about these websites.

Contacting Us

If there are any questions regarding our privacy policy you may contact us using the information below:

Lindgren Tax & Accounting, Inc.
Lindgren & Associates
PO Box 757
Lindstrom, MN 55045
Phone: (651) 257-2152 Fax: (651) 257-4236
Email: lindgren.taxandaccounting@frontiernet.net
Website: www.lindgrentaxandaccounting.com
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