**Email Subject:** Tax Defense Network-Important Information

**Body of Email: Make sure to edit it for each client.**

Dear (Client Name),

My name is David Collins, and I am looking forward to working with you on your tax case. I have several items that I wish to go over with you, so please read this email carefully. Please take a moment to review each of the **bold subject** lines below. Confirm that *all* of this information is accurate and correct. If you need any changes, please email me your response.

**Contract Information:**

*We are contracted to perform the following services for you:*

-              Prepare Federal Individual Tax Returns for Tax Years 2007-2012

-              Attempt Full or Partial Release of Bank Levy

-              Asset Protection Plan

These plans encompass the IRS and any IRS tax debt you may have only.

Is this information correct?

**PERSONAL CONTACT INFORMATION:**

Name of Account:

Mailing Address:

Contact Telephone Number:

Email Address:

Is there another person, contact telephone number, email address or mailing address we need to have in order to communicate with you quickly?  Is there a spouse?

**ITEMS NEEDED FOR YOUR CASE:**

You will also need to start gathering the following information:

•            Signed Power Of Attorney (attached)

•  Tax Questionnaires and engagement letter (attached)

•      Financial Disclosure Form (attached)

Again, thank you for allowing me to work with you on this case. Please do not hesitate to reach out to me if you need any assistance.