

## CPA / Tax Preparer Letter Template

Loan Processor must provide an email to the CPA or Tax preparer based on each Section on the template:

Section A: Buss Info

Section B: Buss Income and Expenses

- Buss Income:
  - Any specific items related to income on income, taxes, P&L
  - Any specific deposits that is out of the borrower / buss deposits trend
  - Declining Income
- Buss Expenses
  - Address if Buss/Borrower has Employees, Subcontractors, both, or none.
  - Personal Bank Statements: What buss expenses are run through the personal bank account.
  - Buss Bank Statements: What personal expenses are run though the business bank account. (this is required in order to use buss bank statements for income calculation)

Section C: Businesses Only

- Provide Buss Financials
  - P&L
  - Balance Sheet
- Comment on usage of Buss funds.

To Whom it may concern

Re: CPA / Tax preparer Letter

**Section A: Buss Info**

This is to certify that \_\_\_\_\_ (Borrower's name) is the proprietor of \_\_\_\_\_ (name of the business company) for the past \_\_\_\_\_ years. Company is located in \_\_\_\_\_ (Address, City, State). The Company main business is \_\_\_\_\_ The company currently has business with: (CPA or Tax preparer to address if business has Employees, Subcontractors, Both, None)

**Section B: Buss Income and Expenses Info:**

\*Personal Bank Statements are used for qualification; CPA needs to address what buss expenses are run through the bank account.

\_\_\_\_\_  
\_\_\_\_\_  
\*Business bank statements are used for qualification; CPA needs to address what personal expenses run through the bank account.

**Section C: Businesses Only**

I am attaching financial statements, (Only required if borrower has an Operating Company)

- P&L.
- Balance Sheet.

\*Buss funds usage for transaction: CPA/Tax preparer to address if will impact the buss negatively.

CPA or Tax preparer Certifies:

- Borrower filed taxes for (Specify the last 2 years): \_\_\_\_\_
- Borrower's Taxpayer Identification Number (TIN) is active.

For any further clarification please reach out to this number \_\_\_\_\_

Sincerely,

\_\_\_\_\_  
(Name)

Accountant CPA

Ptin#:

