261 Sheep Davis Road, Suite 7, Concord, NH 03301, (603) 230-2404, (603)386-6866 fax

**LIFETIME Tax & Accounting PLLC**



**REQUEST FOR PROPOSAL**

ORGANIZATION NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CONTACT NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PHONE\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_FAX\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_EMAIL\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

WEBSITE\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ TAX ID\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

INDUSTRY\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ FISCAL YEAR END\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TAX EXEMPT? \_\_\_\_\_YES\_\_\_\_\_\_NO, IF YES 501(C)\_\_\_\_\_\_, TAX EXEMPT NUMBER\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

WHAT SERVICE DOES THE ORGANIZATION DESIRE FROM OUR FIRM? (CHECK ALL THAT APPLY)

AUDIT OF FINANCIAL STATEMENTS\_\_\_\_\_\_ REVIEW\_\_\_\_\_ COMPILATION\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

A-133/SINGLE AUDIT\_\_\_\_\_\_\_ NON-ATTEST SERVICES\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(bookkeeping, consulting, budgeting, ugeed-upon procedures, etc.)

PREPARATION OF FORM 990/990EZ/990T\_\_\_\_\_\_\_\_\_\_\_\_\_\_ FORM 5500\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

BRIEFLY DESCRIBE THE INTENDED USE OF FINANCIAL STATEMENTS\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

WERE FINANCIAL STATEMENTS PREVIOUSLY AUDITED?\_\_\_\_\_YES, \_\_\_\_\_NO, IF YES, WHAT IS THE REASON FOR CHANGING AUDITORS?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ANNUAL REVENUE $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ TOTAL ASSETS $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NAME(S) AND POSITION(S) OF INDIVIDUAL(S) INVOLVED IN/RESPONSIBLE FOR FINANCIAL REPORTING:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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IF AVAILBLE, PLEASE INCLUDE THE MOST RECENT FINANCIAL STATEMENTS, ANNUAL BUDGET, AND AUDITOR’S REPORT

Mail this form with other documents to Lifetime Tax and Accounting PLLC, 261 Sheep Davis Rd, Suite 7, Concord, NH 03301; or email to [info@lifetimetax.com](mailto:info@lifetimetax.com); or fax to (603) 386-6866.