BACKLOG CONTROLLER office@backlogcontroller.com	Document Our commitment on tax and year-end work	Issued November 4, 2026	Rev. 0	Doc no. P-3

To Any CPA firm that refers a client to Backlog Controller
From Backlog Controller
Date November 4, 2026
Re Clients referred by your firm, tax and year-end work

For every client you refer to Backlog Controller, the tax relationship and the year-end financial statements stay with your firm. We will not prepare an income tax return or give income tax advice to a client you referred, and we will not take on their year-end statements. Nor will we recommend another firm for either. If the client asks us, we send them back to you.

By tax we mean income tax, federal and state: returns, planning and estimated payments. Payroll tax filings stay with the client's payroll service, which we reconcile each month. Sales and use tax returns and the year-end 1099s are part of the monthly books, and we prepare them unless your firm would rather.

Our work is the monthly close. We close the books each month and keep the WIP schedule current through the year. In the month after the fiscal year closes we hand you a package to work from: a trial balance that ties to the WIP schedule, the completed-contracts schedule, the agings with retainage shown separately, and support for every adjusting entry we made.

This holds for as long as we work with the client, and you are welcome to show it to them.

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