

around the

# Water Cooler



[www.abbit.biz](http://www.abbit.biz)

## Helpful Hints When Filling Out A Deposit Form

### Please remember to.....

Send a *completed deposit* form with all new accounts.

Write in *your business name and code*. (Give us a call if you're not sure what your code is).

Choose your *choice of trust* investment.

Write in a *clear, legible print or type* (as to avoid errors in spelling of names and addresses).

Send in *clear, clean copies* of the contract and any paperwork. We scan all paperwork into a document storage system, so clean clear copies are very helpful. Make sure to keep copies for your files.

Fill in the same *check date and contract date* you used on your journals and ledgers.

The organization of your paperwork is greatly appreciated. While staples are a great way to keep the paperwork organized, we prefer you not staple everything together before putting it in the envelope.

Thank you and we greatly appreciate your attention to detail. Question, concerns or comments are always welcome. You may fax us at 800-842-9075, email us at [sandy@abbit.biz](mailto:sandy@abbit.biz) or call us at 800-232-2179.

## Sipping with Sandy . . .

at the Water Cooler

### 1099s Have Been Mailed

It's that time of year again. The 1099s have been mailed to your clients who are in a tax required trust. As in the years past, any of the 1099s that are returned to us in the mail for any reason, will be included in your weekly funds acknowledgement envelope, or they may be mailed separately. This will allow you to forward the 1099 to your client in a timely manner for their tax purposes. When you locate an updated address for you client, please contact Abbit so that we may change it in our preneed system. The corrected address information may be faxed to us at 1-800-842-9075, emailed to us at [sandy@abbit.biz](mailto:sandy@abbit.biz), or you may call us at 1-800-232-2179 with the new address information. Thank you!

---

### CPA Report

Your 2009 CPA Report will be mailed under separate cover during the month of February to assist you and your CPA in preparation of your "2009 Prepaid Funeral and Cemetery Sales Act Annual Report". Your CPA Report, as customary, will be in alphabetical order by name of the beneficiary. However, if you prefer to have the report in chronological order by date of deposit, it is available upon request.