

CPA RELATIONSHIP LETTER

Borrower Name :	
Borrower's Business Name:	
Borrower's Business EIN:	
The above referenced borrower has applied for a mortgage loan. Please answer the below questions.	
How long have you had a business relationship with the borrower?	
What services do you provide for the borrower and how long have such services been provided?	
What documentation did you rely on to prepare the borrower's 12-month P&L?	
How many years has the borrower been self-employed?	
Do you plan to file the borrower's taxes for their business for the immediate tax year due?	
How is the borrower compensated for services rendered in furtherance of his/her business? Does the borrower receive distributions from the business? If so, at what frequency?	
What is the borrower's position/title at their business?	
What is the borrower's ownership percentage in the business?	
How long has the borrower owned the business?	
When was the business formed?	
Is the business currently active, solvent and in good standing?	
To the extent the borrower(s) plan to use funds from their business account for the down payment and/or closing costs on this loan, will withdrawing such funds from the business account negatively impact the borrower's ability to conduct their business affairs?	
What is the nature of the borrower's business?	
CPA/EA/CTEC Name:	
CPA/EA/CTEC Name of Employer:	
CPA/EA/CTEC License Number:	
CPA/EA/CTEC Signature:	
Date:	
CPA/EA/CTEC Phone Number:	
CPA/EA/CTEC Address:	
CPA/EA/CTEC Email Address:	