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## ENGAGEMENT LETTER

### 1. Purpose and Scope

I appreciate the opportunity to assist you with the preparation of your 2025 federal and applicable state individual income tax returns. this engagement outlines the terms and responsibilities for both parties.

### 2. My Services

I will:

- \* Prepare your 2025 Form 1040 and related state returns based on the information you provide.
- \* Electronically file your returns unless you request otherwise.
- \* Provide a secure digital delivery and signature process via SafeSend Returns and/or Smart Vault with DocuSign.

### 3. Your Responsibilities

You agree to:

- \* Provide complete and accurate information by March 2, 2026 to ensure timely filing.
- \* Review your returns for accuracy before signing.
- \* Notify us of any foreign accounts, virtual currency transactions, or other reportable items.
- \* Retain all supporting documentation for your records for 7 years per IRS guidelines.

### 4. Extensions

If your information is not received by the deadline, I may file an extension. Please note:

- \* An extension extends the filing deadline, **NOT** the payment deadline.
- \* You are responsible for any interest or penalties due to late payment.

### 5. Fees

My fees are based on the complexity of your return and time required. Payment is due upon delivery of the completed return and before returns are electronically filed. Invoices unpaid 30 days past the billing date may be deemed delinquent and are subject to an interest rate of 1.5% per month. I reserve the right to suspend my services or withdraw from this engagement in the event that any of my invoices are deemed delinquent.

### 6. Acknowledgment and Consent

Please review this letter carefully. By signing below, you acknowledge and accept the terms of this engagement. If this engagement letter is not signed by you prior to the electronic filing date, submission of any signed electronic filing authorization to me will be deemed acceptance of the terms outlined in this letter.

Accepted by: \_\_\_\_\_

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_