

Date Signed



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This letter is to confirm our understanding as to the terms, scope, and limitations of the services that we
will provide. We will prepare the appropriate return depending on your organization's requirements
(year)U.S. Form 1040 as well as the related state filing requirement.
It is your responsibility to maintain, in your records, the documentation necessary to support the data

used in preparing your tax returns, including but not limited to the auto, travel, entertainment, and related expenses and the required documents to support charitable contributions. If you have any questions as to the type of records required, please ask us for advice in that regard. It is also your responsibility to carefully examine and approve your completed tax returns. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, or for resulting taxes, penalties and interest.

You will submit your tax information (as detailed above) to us no later than **twenty days prior** to your filing deadline. If, for some unforeseen reason, your data is not complete at that time, please submit whatever is ready. Be aware that if you submit your data after that date, it may be necessary to apply for an extension to file those returns. Ultimately, you may be subjected to late penalties on your returns because of this delay.

Fee for our services will be at our standard rate of \$200 per hour plus computer charges and out-of-pocket expenses. **Payment for service is due when rendered**. You acknowledge and agree that in the event we stop work or withdraw from this engagement as a result of failure to pay on a timely basis for services rendered as required by this engagement letter, we shall not be liable for any damages that occur as a result of our ceasing to render services. By signing this engagement letter, you acknowledge and agree that Taylor's Accounting/365 Tax Strategy has the right to submit the overdue account to collections. Any travel to and from the client's locations will be billed at our hourly rate of \$65. We can estimate a range of your preparation fee upon request.

COMPLIANCE AND JUDGMENT

Our work in connection with the preparation of your individual tax returns does not include any procedures designed to discover fraud, defalcations, or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as we find necessary for preparing the income tax returns.

You are confirming that you will furnish us with all the information required for preparing the returns. We will use our professional judgment in preparing your returns. Given the magnitude of changes the Tax Act contains, as well as some new concepts introduced in the law, additional stated guidance from the Internal Revenue Service, and possibly from Congress in the form of technical corrections, may be forthcoming. We will use our professional judgment and expertise to assist you give the Tax Act guidance as currently promulgated. Subsequent developments issued by the applicable tax authorities

may affect the information we have previously provided, and these effects may be material. Whenever we are aware that a possibly applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (e.g., tax agencies and courts), we will explain the possible positions that may be taken on your return. In accordance with our professional standards, we will follow whatever position you request, as long as it is consistent with codes, regulations, and interpretations that have been promulgated.

FOREIGN INVESTMENTS AND ACCOUNTS

If you and/or your entity have a financial interest in, or signature authority over, any foreign accounts, you may be subject to certain filing requirements with the U.S. Department of the Treasury, in addition to the IRS. Filing requirements may also apply to taxpayers that have direct or indirect control over a foreign or domestic entity with foreign financial accounts, even if the taxpayer does not have foreign account(s).

The filing deadline for the Report of Foreign Bank and Financial Accounts (FBAR) required by the U.S. Department of the Treasury is April 15th and follows the federal income tax due date guidance, which notes that if the tax due date falls on a weekend or legal holiday, the form is considered timely filed if filed on the next business day. An automatic 6-month extension is available. Electronic filing of the FBAR is mandatory using the Bank Secrecy Act (BSA) e-filing system for the Financial Crimes Enforcement Network (FinCEN). We must receive a signed consent form from you prior to submitting the foreign reporting form. If we do not receive your signed authorization to file your foreign reporting form, we will not be able to file any of the required disclosure statements on your behalf.

Additionally, the IRS requires information reporting on foreign interests or activities under applicable IRS sections and related regulations, and the respective IRS tax forms are due when your income tax return is due, including extensions. The IRS reporting requirements are in addition to the U.S. Department of the Treasury reporting requirements stated above. Therefore, if you have any direct or indirect foreign interests that require disclosures to the IRS, you must provide us with the information necessary to prepare the applicable IRS forms.

Failure to timely file the appropriate forms with the U.S. Department of the Treasury and the IRS may result in substantial civil and/or criminal penalties. By your signature below, you agree to provide us with complete and accurate information regarding any foreign accounts that you and/or your entity may have had a direct or indirect interest in, or signature authority over, during the above referenced tax year. The foreign reporting requirements are very complex, so if you have any questions regarding the application of the U.S. Department of the Treasury and/or the IRS reporting requirements to your foreign interests or activities, please ask us for advice in that regard. We assume no liability for penalties associated with the failure to file or untimely filing of any of these forms.

SUBSTANTIATING DOCUMENTATION

It is our policy to keep records related to this engagement for 7 years. However, the firm does not keep any original client records, so we will return those to you at the completion of the services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies.

AUDIT AND CORRESPONDENCE

We are responsible for preparing only the return listed above. Our fee does not include responding to inquiries or examination by taxing authorities. However, we are available to represent you. To give our clients peace of mind, we have created out OPTIONAL Audit and Correspondence Program where we will cover any regulatory communication and/or audits for this tax year for a one-time fee of \$200. The Audit and Correspondence Program is only good for the current tax year and the fee is not refundable if you are not audited.

Our tax preparation fee does not include responding to inquires or examination by taxing authorities. If you decline to opt into our Audit and Correspondence Program, any letters you receive from the state or IRS, office visits, telephone consultations, and/or emails through the current tax year is subject to our tax rate of \$200 per hour.

COMMUNICATION

In connections with this engagement, we may communicate with you or others via email transmission. We take reasonable measures to secure your confidential information in our email transmissions, including password protecting tax returns and other confidential documents. However, as emails can be intercepted and read, disclosed, or otherwise used or communicated by an unintended third party, or may not be delivered to each of the parties to whom they are directed and only to such parties, we cannot guarantee or warrant that emails from us will be properly delivered to and read only by the addressee. Therefore, we specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure or communication of email transmissions, or the unauthorized use or failed delivery of emails transmitted by us in connection with the performance of this engagement. In that regard, you agree that we shall have no liability for any loss or damage to any person or entity resulting from the use of email transmissions, including any consequential, incidental, direct, indirect, or special damages, such as loss of sales or anticipated profits, or disclosure or communication of confidential or proprietary information.

We may from time to time, and depending on the circumstances and nature of the services we are providing, share your confidential information with third-party service providers, some of whom may be cloud-based, but we remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality agreements with all service providers to maintain the confidentiality of your information and will take reasonable

precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure an appropriate confidentiality agreement, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Although we will use our best efforts to make the sharing of your information to such third parties secure from unauthorized access, no completely secure system for electronic data transfer has yet been devised. As such, by your signature below, you understand that the firm makes no warranty, expressed or implied, on the security of electronic date transfers.

ARBITRATION/MEDIATION

If any dispute arises among the parties hereto, the parties agree to first try in good faith to settle the dispute by mediation administered under its applicable rules for resolving professional accounting and related services disputes before resorting to litigation. The costs of any mediation proceeding shall be shared equally by all parties.

Client and accountant both agree that any dispute over fees charged by the accountant to the client will be submitted for resolution by arbitration in accordance with the applicable rules for resolving professional accounting and related services disputes, except that under all circumstances the arbitrator must follow the laws of Colorado. Such arbitration shall be binding and final. IN AGREEING TO ARBITRATION, WE BOTH ACKNOWLEDGE THAT IN THE EVENT OF A DISPUTE OVER FEES CHARGED BY THE ACCOUNTANT, EACH OF US IS GIVING UP THE RIGHT TO HAVE THE DISPUTE DECIDED IN A COURT OF LAW BEFORE A JUDGE OR JURY AND INSTEAD WE ARE ACCEPTING THE USE OF ARBITRATION FOR RESOLUTION. The prevailing party shall be entitled to an award of reasonable attorneys' fees and costs incurred in connection with the arbitration of the dispute in an amount to be determined by the arbitrator.

If the above fairly sets for your understanding, please sign the enclosed copy of this letter and return it to us. Please note that you are affirming to Taylor's Accounting your understanding of, and agreement to, the terms and conditions of this engagement letter by any one of the following actions: returning your signed engagement letter to our firm, returning your income tax information to us for use in the preparation of your returns, the submission of the tax returns we have prepared for you to the taxing authorities, or the payment of our return preparation fees.

We are pleased	to have you	ı as a client	and look	forward as	sisting with	your tax r	needs

Sincerely,

Jason Taylor

Taylor's Accounting 365 Tax Strategy

Were you required to file 1099's for	?			
YES – I was required to file 1099	s and filed with approp	riate reg	ulatory agency	
NO – I was not required to file 1	099's for 2024			
Did you have any foreign investments,	property, accounts?	YES	NO	
Would you like to Opt in to the Audit a	nd Correspondence Pro	ogram fo	r \$200?	
YES – Please enroll me in the Au	dit and Correspondence	Program	n for an additio	nal fee of \$200.
NO — I do not wish to enroll in the I understand any letters received and/or emails are subject to the	d from taxing authoritie			
Do you give permission to Taylor's Accome on any tax changes throughout the			on my tax retu	rn to update
Do you want your Final Tax Return and \$25? If you live out of state, we will au	• •		•	for a fee of
YES – Please priority mail.				
NO – Please do not mail, I will p	ick up all documents at	the offic	e.	
IMPORTANT - Reserve your Strategy for a \$100 deposit final tax preparation fee.	•			
Approved:				
Client – Signature	•			
Client – Printed		Client S	pouse (if applic	able) – Printed
Date				



Audit and Correspondence Program Agreement

Membership.

The following terms and conditions of this Agreement (the "Agreement") govern the Taylor's Accounting/365 Tax Strategy Audit and Correspondence Program ("Program") provided to members of the Program ("Members") by Taylor's Accounting/365 Tax Strategy (cumulatively referred to as "Company"). By accepting enrollment in the Program, you are agreeing to the terms of this Agreement.

1. Definitions: The following definitions are applicable to the Agreement.

- a. "ERO" means the Electronic Return Originator participating in the Program approved and authorized by Company.
- b. "Taylor's Accounting/365 Tax Strategy Audit and Correspondence Program" (or the "Program") is a service program offered by Company.
- c. "Return" means an IRS acknowledged individual federal tax return form 1040 (including schedule A, C and E) for the previous year's tax return $\frac{1}{2}$
- and is not otherwise excluded in this Agreement.
- d. "Tax Preparer" means the individual completing and signing the acknowledged 1040 Return as the paid preparer.
- e. "Taxpayer" or "Member" means the individual for whom the Tax Preparer completes and signs an acknowledged 1040 Return, and

Company receives payment of the Company Program Fee.

- f. "Program Fee" the fee charged by the Tax Preparer or ERO and paid by Member for the Program.
- g. "Company" Taylor's Accounting/365 Tax Strategy
- 2. <u>Services provided by Company under the Program</u>: From the date the IRS has acknowledged transmission of your Return and Company receives payment of the Company Program Fee and for a period of three (3) years after the filing deadline of April 15 (the Membership Term), for the tax year preceding the year of enrollment, if the Taxpayer's Return is audited by the IRS or the IRS denies any of the credits described in Section 2.7, Company will provide the Taxpayer with the following services (collectively, the "Services"):
- 2.1 Evaluation of all related IRS correspondence.
- 2.2 Explanation of claim requirements and the available options.
- 2.3 Professional IRS document review, consultation, and organization.
- 2.4 Drafting of letters and other necessary correspondence with the IRS as needed.
- 2.5 Assistance with telephone communication with the IRS agent for explanations and discussions during the audit process.
- 2.6 Assistance with all IRS forms including schedules A, C, and E unless excluded below in section 3.
- 2.7 Assistance with denied credits, including: Earned Income Credit, Child and Dependent Care Credit, Education Credits, Child Tax Credit,

Additional Child Tax Credit, Adoption Credit, Credit for the Elderly or Disabled, Savers Credit.

- 2.8 Assistance with rejected W-7 applications.
- 2.9 Assistance with IRS Identity Theft
- 2.10 Tax debt relief including but not limited to Installment Agreements, Offer in Compromise, Tax Penalty Abatement, Streamline Installment

Agreements, Tax Liens, Wage Garnishment Relief, Innocent Spouse Relief provided that Taxpayer meets all IRS guidelines for approval of the

- applicable debt relief and pays all associated governmental fees.
- 2.11 The Services are subject to change, modification, or substitution at any time without notice to the Member.
- 3. Services provided by Company under the Tax Reimbursement Program: From the date the IRS has acknowledged transmission of your return and for a period of three (3) years after the filing deadline of April 15 (the Membership Term), for the tax year preceding the year of enrollment, if the Participant's Return is audited by the IRS, and it is determined that additional fees, penalties and interest are due as the direct result of a legitimate Error made by a Participating Tax Preparer, Company will provide the Participant with the reimbursement of up to \$2,500.00 in additional fees, penalties and interest, subject to the limitations and qualification criteria described in section.
- **4.** <u>Program Exclusions</u>: The following types of tax returns and or IRS Inquiries are specifically excluded. Company is under no obligation to provide Taxpayer with the Services in connection with such returns and or IRS Inquires:
- 4.1 Non-Resident federal returns.
- 4.2 Returns other than individual 1040 returns including, but not limited to, corporate, partnership, trust, estate, gift and employment returns.
- 4.3 Returns in which the Taxpayer, Tax Preparer or ERO had knowledge of additional taxes owed as of the date Taxpayer enrolled in the
- 4.4 Returns prepared with gross negligence, recklessness, intentional misrepresentation, or fraud.
- 4.5 Local city and county returns.
- 4.6 Returns that have become subject to IRS criminal investigations.
- 4.7 IRS inquiries related to foreign income, flow-through entities (partnerships and S-corporations as reported on Schedule K), court awards and damages, bartering income, cancelled debt, estate and gift tax.
- 4.8 IRS inquiries related to the following credits: Foreign tax credit, Plug-in electric vehicle credit, Residential energy efficient property credit, Mortgage interest credit, Credit to holders of tax credit bonds, Health coverage tax credit, "Credit" for prior year minimum tax, "Credit" for excess Social Security tax or railroad retirement tax withheld.
- 4.9 Due to a lack of Clarity from the IRS on the Affordable Care Act, we may not be able to assist with all IRS inquiries and audits related to the Affordable Care Act.
- **5.** <u>Taxpayer Responsibilities</u>: In order for Company to be obligated to provide the Services to Taxpayer, the Taxpayer agrees to take the following actions:
- 5.1 Contact the IRS (with the assistance of Company) per the audit notice received to request an extension of the deadline for responding.
- 5.2 Notify Company of any IRS correspondence or notice regarding the Return within fifteen (15) days from the date of such notice along with a complete copy of the Return.
- 5.3 Provide Company any further assistance or documents as requested that support claims made on the Return.
- 5.4 Pay the Program Fee. In the event ERO charges Taxpayer a Program Fee, Taxpayer agrees to pay the Program Fee by paying such fee directly to the ERO.

- 6. <u>Disclosure of Information</u>: Taxpayer hereby agrees that his/her specific Taxpayer information, including all information that Taxpayer has disclosed to the ERO or has been included on the Return, may be disclosed by the ERO to Company and used by Company in the manner consistent with this Agreement.
- 7. <u>Cancellation and Refund Option</u>: If, for any reason, a Member is not satisfied with the Program and wishes to terminate his/her membership, the Member may cancel the membership by notifying Company in writing or by telephoning an employee of Taylor's Accounting/365 Tax Strategy. Membership in the Program shall terminate on the date that Company receives written notice of cancellation. Cancellations within the *first 30 days* of Membership may be eligible for refund.
- 9. <u>Disclaimer</u>: Failure to comply with procedure and strategy actions recommended by Company may result in an IRS ruling unfavorable to the Taxpayer. Failure or refusal to comply with requests or instructions from the IRS during the audit may result in adverse actions taken by the IRS to Taxpayer's detriment. In either case, Company will not be held responsible for the outcome and reserves the right to cease providing services when reasonably warranted.
- 10. <u>General Release</u>: Each Member who uses the Services under the Program membership hereby forever releases, acquits and discharges Company and their employees, agents and affiliates from any and all liabilities, claims, demands, actions, and causes of action that such Member or Member's legal representative(s) may have by reason of any monetary damage or personal injury sustained as a result of or during the cause of the use of any and all Services under the Program. The sole recourse available to a Member or Member's legal representative(s) against Company shall be cancellation of the Program membership as provided in Section 6 and any refund available as provided in Section 6.
- 11. **Notices**: Any and all notices, consents, approvals, requests, and other written communications given or required under the terms of this Agreement shall be deemed to have been duly given and served when sent by email, U.S. Postal mail, postage prepaid and addressed to the Member, at the address provided by the Member.
- 12. <u>Entire Agreement:</u> This Agreement sets forth the entire agreement and understanding of the parties with regard to membership in the Program. No representations, inducements, promises or agreements, or otherwise, shall be of any force or effect. The validity or unenforceability of any term of this Agreement shall in no way affect the validity or enforceability of any other terms or provisions of this Agreement. Member Acknowledges that THE PROGRAM IS NOT INSURANCE.
- 13. <u>Binding Effect</u>: This Agreement shall be binding upon and inure to the benefit of the parties as well as their respective successors and permitted assigns.
- 14. **Governing Law**: This Agreement shall be governed and construed in accordance with the laws of the State of Colorado regardless of any application of principles regarding conflicts of laws.
- 15. <u>Headings:</u> The headings or captions provided throughout this Agreement are for reference purposes only and shall in no way affect the meaning or interpretation of this Agreement.
- 16. <u>Waiver of Breach</u>: Waiver of breach of any provision of this Agreement shall not be deemed a waiver of any other breach of the same or different provision.





Consent to enroll into Taylor's Accounting/365 Tax Strategy Audit and Correspondence Program

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to enroll in our Program, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

You will be automatically enrolled in our program upon completion of your 1040 tax preparation. You must "Opt out" to be excluded from this Program. If you choose to "Opt out" of the Program, any and all Audit or Tax Notice responses will be billed at an hourly rate of \$200.00 per hour.

Tax Year	
Yes, please enroll me into the Program	
No, I am opting out of the Program.	
Taxpayer signature:	Date:





Basic Information

Taxpayer		Phone Number	
Spouse		Phone Number	
Address		City	
County	Zip	_	
Taxpayer SSN	Birthdate_		Occupation
Spouse SSN	Birthdate _		Occupation
Taxpayer Email		Spouse Ema	ail
Bank Information (for dire	ct deposit of refund c	hecks) Checking	Savings
Routing Number		Account Number _	
Taxpayer Driver's License	e Number	Expiration _	Issued
Spouse Driver's License I	Number	Expiration	Issued
	Comple	ted Return	
How would you like to rec	eive your completed r	return? PDF	Hard Copy Both
	Healt	h Insurance	
Do you have Health Insur If purchased through the	·		
		Crypto	
Do you have a Crypto Cu If yes, please be	rrency Account? Yes_ ring in Form 8949.	No	
Have you been assigned	a PIN by the IRS? Wi	nat is your 2024 PIN	I





Dependents

Name	Relationship	Bir 	thdate	SSN 		Months In House
Employer		 s - Plea	ase bring in	your V	V-2 form Box 1	
Employer		DOX 2				7 DOX 19
Interest Income		bring	ividend Indian Jour Div	ridend 1		Qualified
Do you have a fo	reign bank accou		Yes	No	Please bri	ng in last statement
Mı	utual Fund D	ividen	ds - Please	bring i	n your 1	099's
Payer	Dividends	Qu 	alified Dividend	ls	Capita	al Gain





Other Income

Uneı Partı Awa	mploymer	come- Attach K-1 Prizes	· · · ·		
		Payer	Amount	Fed W/H	State W/H
Pens	sion Incon	ne			
Soci	al Securit	y Income- Taxpayer		Spouse	
	(Th	ese expenses mı	Medical Exp ust exceed 7		oss Income)
1. 2. 3. 4.	Prescrip Transpo Medica	ortation, Miles for Medic I Equipment, Eye Glass	al es, etc.		
5. 6. 7.	Long T	s, Dentists, and Hospital erm Care Insurance ontributions-Please bring			of Policies
			Taxes P	aid	
	2. S 3. G	Real Estate Taxes on Ho State Income Tax Withho Ownership Tax on Cars Sales Tax paid on Auto	eld .		





Interest Paid- Please bring in Form 1098

4	Llaura Mautorana lustavaat 4st Maut		nk Name	Amount	
1.	Home Mortgage Interest 1 st M		unt		
2.	2 nd Mortgage Interest What were these funds used for?				
	Did you refinance this year? If ye If yes, please bring a copy of the				
		Other			
1.	Alimony/Maintenance List recipients SSN		ate of Divorce		
2.	Solar Energy Expenses - New win	ndows, insulation etc	i		
3.	Child Care Expenses:				
Pa	id To Federal ID/SSN			Amount	Phone
			Property		
De	escription Date Acq	uired Date Solo	d Sale I	Price	Cost





Retirement

Payment to IRA Payments to SEP Payments to Roth IRA			
College Ed	ducation Expenses	s-Please Bring	Form 1098-T
Student Name	Year in College	School Name	Tuition Expense
	t		_
Payments to 529 Plans		_	
Dic	d you pay quarterly	estimates in 2	2024?
4/24	Federal	Stat	e
6/24 9/24			
3/2 4 1/25			



3.



Charitable Contributions

		 Signature	 Date	
			te. If I become aware of any repared, I will notify you	
		e year in connection w ΓΑ, etc.	ith church and/or other charitab	ole wor
Non-Cash Co Organization			ed – (www.itsdeductible.com) How was value determine	ed?
	Amou 	nt L	o you have a Receipt?	

If you have a rental property or small business see next page

Rental Income & Expenses- (List each property separately)

Property Address		Date Pur	chased	
Total Rents Received		Purchase Price		
# of Days Rented		Date Rented		
Hours spent on Rental activity				
Expenses:				
Advertising		Legal		
Auto & Travel				
HOA		Supplies		
Commissions				
Insurance		Utilities		
Interest				
Appliances/Major Improvements/Etc.				
Description	Amount	D	ate Purchased	
Square footage of office Square footage of office Home Utility Business Income Home Utility Expenses Advertising Bank Charges Car Expenses/Miles Commissions Dues Dues Dues Dues Square processions Square process	tiesBr Offic Prof Ren Rep	Hong in Form See Supplies Sessional Feet t airs	ne Repairs	
Freight				
Insurance	_ Utilit	ties		
Interest	_ Miso	D		
Cell Phone		el & Entert	ainment	
Major Purchases (Description)				
	Car 1		Car 2	
 Auto expenses: Gas, Ins., Repairs, Lease Total Miles Driven – 2024 Business Miles Do you have written evidence to support 				
car mileage?	Yes No	Ye	es No	