

## Engagement Agreement for Income Tax Preparation

Thank you for selecting our accounting firm, Cruise & Associates, Inc., to assist you with needed tax work. We are providing you this engagement letter to confirm the terms of, and limitations upon, the professional tax services that our accounting firm has agreed to perform on behalf of the individual and or entity listed below. We will prepare and submit to you for filing the federal and state income tax returns for you for the **2024** tax year. The specific tax returns we have agreed to prepare for you include on an as needed basis are as follows: Federal and State Income Tax Returns. Any additional returns that you may be required to prepare and file for any tax authority are not part of this engagement.

We must have your full cooperation and assistance in preparing your tax returns. We will prepare the tax returns we have agreed to undertake for you using and relying on the information and documents that you are providing to us. It is your responsibility to provide information that is authentic and accurate. We rely on you to ensure that such information is authentic and accurate. We must have your cooperation in providing us in a timely and complete fashion with all this needed information and documentation. Upon your request we will provide you with a "tax organizer" for you to facilitate the gathering of necessary documents and information. We may ask you to clarify certain items you furnish to us, but we will not audit or otherwise independently verify any of the information and documents that you are furnishing to us. We are not engaged to detect fraud, embezzlement, or other wrongdoing and do not guarantee a particular result or outcome. Should we not have your full cooperation in gathering together all of this needed information and documentation in a timely fashion, and to otherwise cooperate with us, we reserve the right to disengage from this engagement by sending you written notice to that effect.

Our engagement will be complete once we deliver to you the completed tax returns that we are preparing on your behalf. Thereafter, you will be totally responsible for filing these returns and making any needed payments in a timely fashion with the appropriate taxing authorities.

We have also agreed to provide you as part of this engagement with certain tax planning services that are related to the preparation of the tax returns listed above. Unless agreed to otherwise in writing, these tax planning services, however, will be limited to advising you of any steps you might still take to minimize your tax liability in connection with the specific tax returns listed above that we are now preparing on your behalf. No other tax planning services you may need assistance on will be provided as part of this engagement unless we later agree in writing to do so.

If during the course of performing this engagement we discover information or documents that affect any prior year return, we will bring this issue to your attention. We will not, however, be responsible for identifying all matters that might affect returns for prior years. Should you become aware of any such matter, please contact us to consider the best way to resolve the situation.

We have agreed that our accounting firm will be compensated on a timely basis at our standard pricing schedule and the invoice for such services is hereby made part of this agreement by this reference. We have also agreed that our accounting firm will be paid on a timely basis for the cash disbursements we reasonably incur in the course of this engagement. It is understood and agreed that if you do not pay these fees and cash disbursements in a timely manner, once billed, that we reserve the right to withdraw from this engagement by sending you written notice to that effect. It is further understood and agreed that should any such withdrawal on our part take place that you will remain responsible for paying all of our fees and cash disbursements that have accrued up to the date of our accounting firm's withdrawal from this engagement.

We have further agreed that should you and our accounting firm, reach any substantial disagreement regarding what information we believe in our professional opinion must be disclosed in these tax returns that we also reserve the right to withdraw from this engagement on that ground by sending you written notice to that effect. It is further understood and agreed that should any such withdrawal on our part take place that you will remain responsible for paying all of our fees that have accrued up to the date of our accounting firm's withdrawal on such grounds from this engagement.

The Company will send the Client periodic invoices for fees and costs incurred in performing this engagement. Each invoice will be payable within ten (10) days of its mailing date. Accounts which are more than ten (10) days past due are considered delinquent and a finance charge of one and one-half percent (1 1/2%) per month will be charged. Any returned payments will be re-billed right away with a 50.09 return charge fee. The Client acknowledges these charges and agrees to pay them in full. In addition, the Client affirmatively represents to Cruise & Associates, Inc that he or she is not contemplating filing for relief under the bankruptcy code.

We need to have you sign where indicated at the bottom of this engagement agreement, to confirm that you agree that this engagement agreement fairly sets forth the agreement between us regarding both the terms of and limitations upon the professional tax services that we have agreed to provide on your behalf. Should you have any questions about this needed requirement or any of the provisions set forth above in this engagement agreement, feel free to contact us.

Very Truly Yours,  
Cruise & Associates, Inc.

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Print Business or Individuals Name

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Signature

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Date