



Letter of Engagement– Tax Services

Thank you for instructing us to act as your tax preparer. To ensure that there are no misunderstandings regarding the nature and extent of the services that we will provide you, this contract outlines the scope of our work.

Terms of Contract

On the basis of the information and instructions you provide, we will complete your federal and state tax filing for tax year 2025. Please note that we do NOT handle local tax filings EXCEPT NYC, unless otherwise agreed by both parties in writing.

The services to be provided will NOT include all matters ancillary to those services, such as dealing with and responding to queries raised by the IRS or other taxation authorities. In the event of such government tax examination, we will be available upon your written request to represent you during the examination and/or during any appeal. Any such representation will be the subject of, and governed by, a separate engagement letter with additional service fees.

Extent of Services

We will not audit, review, or carry out any other checks on the accuracy or completeness of the information you provide. It is up to you to give us accurate and complete information to enable us to provide the services described in this letter, and we accept no liability for the accuracy or completeness of any information supplied by you in any form.

Accordingly, no assurance on any assertions contained in the financial information compiled will be provided.

Our engagement does not include the investigation or discovery of errors, illegal acts, or other irregularities, including, without limitation, fraud, or non-compliance with laws and regulations. However, we will inform you of any such matters that come to our attention during the course of our engagement.

The information you are to supply and any other information that we consider necessary to complete the engagement must be provided in a timely manner in order for the assignment to be completed on a timely basis.



Personal and Financial Information Use and Distribution

We understand that the intended use and distribution of the personal and financial information we will compile is for the special purposes of your tax return completion. If this should change in any material respect, you will inform us immediately.

Reporting Requirements for your Foreign Financial Assets

Please refer to our document “Foreign Financial Assets Reporting Requirements” to determine if you are required to report your foreign financial assets. By signing this engagement letter, you acknowledge that you have received, read and understood the documents. We will not prepare any of the required disclosures statements unless you provide us with information regarding any interest you may have in foreign accounts.

Information and Disclosure

All assignments will be conducted in accordance with the professional standards, rules, and ethical requirements of Circular 230. Information we obtain in the course of this engagement is subject to confidentiality requirements. We will not disclose that information to other parties without your express consent, except as required by law or professional obligations.

Communication

All communications are expected to be conducted exclusively through the TaxDome portal for security reasons. As our client, you are expected to respond to our inquiries and provide required documentation in a timely manner so we can perform our work properly. If delays occur due to a lack of response on your part, we cannot be held responsible for any consequences resulting from such delays.

Limitation of Liability

At all times, we will use reasonable skill and care in providing our services to you. However, in spite of this, our liability to you, whether in contract, tort, equity or otherwise, for any loss or damage or expenses (including legal costs) suffered or



incurred directly by you as a direct result of any act or omission by us in providing our services, shall be limited to a maximum amount equal to the fee (excluding tax, disbursements and expenses) paid to us by you in respect of the services in question. If the services were provided in respect of more than one financial year, the basis on which the liability amount is based shall be the fee paid in respect of the financial year in which the act or omission occurred. Any claim against us must be brought within twelve months of the date on which we complete the services.

Fees and Payment

Unless otherwise agreed with you in writing, our fees are calculated based on our price schedule. By signing this engagement letter, you acknowledge that you have received, read and understood our price schedule. Our most recent price schedule can be found on our website: <https://www.service.unlimitedadvisoryllc.com/docs>

If required by you, we will provide you with either an estimate, or firm quotation, of the fees involved prior to commencing an assignment.

Our invoices will generally be issued once your return is completed, and all invoices will be due before we submit the e-filing.

You should be aware that, like all other providers of services, we are entitled to retain possession of your records that have been used in relation to this engagement until outstanding fees are settled.

Ownership of Work Papers

Material that you provide to us remains yours and will be returned to you when the engagement is completed. The work papers that we create remain our property.

Where we provide taxation services for you, we will store tax records that we hold on your behalf for a period of seven years after the applicable balance date. At the end of that period, unless you ask us to send that information to you, the records will be destroyed using a secure document destruction service.

Non-accounting advice and financial advice

This firm does not provide legal or financial advice. Any opinion expressed should be confirmed by the appropriate professional. Any comment made on the subject of legal



or investment matters should be interpreted as only a personal view and not professional advice.

Future Years

This letter applies for tax year 2025 only unless both you and we wish to extend the arrangement.

Conclusion

If you have any questions regarding this letter of engagement, please do not hesitate to reach out.

In order to signify your acceptance of the terms of engagement, please sign below in your client portal.

We appreciate your business and thank you for engaging us.