



BR TAX GROUP, LLC {the firm} will prepare your personal and or business federal income tax return(s) (form 1040, 1120, 1120-S, 1065) and personal state income tax returns for tax year ending December 31, 2024.

Here are the terms of our engagement (agreement) with you:

We will prepare your tax returns as noted above only on the information you furnish. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will depend on the information you are supplying as being accurate and complete to the best of your knowledge, and we will rely on your representation that you have maintained the documentation required by law to support the information you are providing, including your expenses for meals, entertainment, travel, gifts, vehicle use, and charitable contributions but it may be necessary to ask you for clarification of some of the information you provide. We will not audit or otherwise verify the data you submit to us.

Our engagement cannot be relied upon by you or third parties to discover errors, fraud, or other illegal acts that may exist, and our engagement expressly disclaims any obligation to do so. We will inform you of any bookkeeping and/or accounting errors which come to our attention.

Your returns may be selected for review by one or more taxing authorities. Additional work required, including responding to any inquiries from tax authorities, tax planning or amended returns is not included in this engagement. In the event of a taxing authority examination, we will refer you to an appropriate individual to assist in representing you.

The timeliness of your cooperation is essential to our ability to complete this engagement. We must receive sufficient information from which to prepare your returns within a reasonable period prior to the applicable filing deadline. If we do not receive information from you within a reasonable period prior to the prior to the filing deadline, it may be necessary for you to pursue an extension (for an additional charge) of the due date to file your returns. This does not extend the time to pay your tax. Taxes paid after the due date will result in the imposition of interest and/or penalties by taxing authorities. We are not responsible for such penalties or interest.

The law provides various penalties and interest that may be imposed when taxpayers underestimate their tax liability. You acknowledge that any such understated tax, and any imposed interest and penalties, are your responsibility, and that we have no responsibility in that regard.

We use a third-party software vendor for the processing of certain tax information, including the transmittal of all tax returns that are filed electronically. This vendor is in the United States and is subject to the same confidentiality and privacy rules of the Internal Revenue Service to which we are subject. We will, if possible, e-file your returns upon receipt of a signed form 8879 and or 8453 (e-file transmittal form). It is possible your e-filing may be rejected; in which case we will prepare returns for paper filing. There will be an additional charge for re-compiling the returns for paper filing.

Our fees for this engagement are not contingent on the results of our services. Our fee for tax return preparation will be based on the amount of time required at prevailing billing rates and/or charges for specific forms used. Fees for tax return preparation are due at the time we deliver the completed return (e.g., when the return is ready to be signed by you).

You promise to review the returns before signing them or forms 8879/8453. Tax returns will not be electronically filed until the fee is paid.

We will use our judgment in resolving questions where the tax law is unclear, or where there are conflicts in interpreting the law. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. In order for us to make these determinations, we must rely on the accuracy and completeness of the relevant information you provide to us, and, in the event we and/or you are assessed penalties due to our reliance on inaccurate, incomplete, or misleading information you supplied to us (with or without your knowledge or intent), you will indemnify us, defend us and hold us harmless as to those penalties.

The advice, suggestions, and opinions which we provide are based on facts and information provided by you and applicable law at that time.

The firm does not keep any original client records - they will be returned to you at the completion of the engagement. It is your responsibility to retain and protect your records for possible future use, including potential examination by the taxing authorities. The balance of our files, other than a copy of your income tax return, which we will provide to you at the conclusion of the engagement, is our property, and we will provide copies of such documents at our discretion and if compensated for any time and costs associated with the effort.

Where a joint tax return is prepared, tax returns and supporting information will be made available to either spouse without the consent of or notification to the other spouse.

In the event we are required to respond to a subpoena, court order or other legal process for the production of documents and/or testimony relative to information we obtained and/or prepared during the course of this engagement, you agree to compensate us (at our then prevailing hourly rate) for the time we expend in connection with such response, and to reimburse us for all of our out-of-pocket costs incurred in that regard.

In the event that we are or may be obligated to pay any cost, settlement, judgment, fine, penalty, or similar award or sanction as a result of a claim, investigation, or other proceeding instituted by any third party, and if such obligation is or may be a direct or indirect result of any inaccurate, incomplete, or misleading information that you provide to us during the course of this engagement (with or without your knowledge or intent), you agree to indemnify us, defend us, and hold us harmless as against such obligation.

This agreement is intended as the complete agreement and can only be modified in writing signed by both of us. We reserve the right to terminate this agreement.

In the case of work products covering more than one party, the undersigned enters into this agreement on behalf of all affected parties (i.e., husband signing for both spouses).

If any provision herein is inoperative, the remainder of this agreement shall remain in full force and effect.

Read, understood, and agreed to on date:

Taxpayer Signature _____

Date:

Consent to Use and Disclosure of Tax Information (IRS Form 7216)

In compliance with IRS regulations, BR Tax Group LLC requires your consent to use and disclose your tax return information to trusted third-party providers for tasks related to the preparation and filing of your tax return.

Purpose of Consent

- Use: Your tax return information will be used solely for preparing, reviewing, and filing your 2024 tax return.
- Disclosure: Your tax information may be disclosed to trusted third-party providers who assist in the preparation process. These providers are vetted and contractually obligated to maintain strict confidentiality and data security.

What Information Will Be Shared

This includes but is not limited to:

- Personal identification details (e.g., name, address, Social Security Number).
- Tax-related information such as income, deductions, credits, and supporting documentation. Voluntary Consent - Your consent is voluntary and valid for one year from the date of signature.
- Refusing to provide consent will not affect our ability to prepare the tax return but may limit the tools or services available.
- You may withdraw consent at any time by notifying us in writing.

Acknowledgment By signing below, you authorize BR Tax Group LLC to use and disclose your tax information as described above.

Taxpayer Name: _____

Taxpayer Signature: _____

Date: _____

Spouse Name (if filing jointly): _____

Spouse Signature (if filing jointly): _____

Date: _____