

Engagement Letter for Your 2025 for your Individual and Business Tax Returns

Thank you for choosing Knuff & Kunde CPAs to assist you with your 2025 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2025 federal and state income tax returns from the information you furnish to us. We will make no audit or other verification of the data you submit. It is your responsibility to provide us with the information necessary to prepare complete and accurate returns. You're aware of IRS record keeping and documentation requirements and you represent that you have the necessary documentation especially for business travel and entertainment, business use of autos (including mileage logs), and barter activities, if any. You should retain all tax documents, including cancelled checks and other data that form the basis of income and deductions. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. Your returns may be selected for review by the taxing authorities. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

If we, in our sole discretion, believe a conflict of interest has arisen affecting our ability to deliver services to you in accordance with either the ethical standards of our firm or the ethical standards of our profession, we may be required to terminate our services without issuing our work product.

Unless you advise us otherwise, you authorize us to send you sensitive tax information via email. Unless you advise us otherwise, you authorize us to use SmartVault.com for archiving and sending you sensitive tax information electronically. By consenting to the use of SmartVault.com, you acknowledge and accept the risk that your data may be exposed to third parties beyond our control. Furthermore, if you request documents electronically, you understand that such documents may be archived on SmartVault.com and/or viewed by unauthorized third parties. You agree to hold us harmless and free from any liability that could or may occur as a result of such exposure or unauthorized access. Your use of SmartVault.com for receiving and archiving your tax documents signifies your acceptance of these terms.

All invoices are due and payable upon presentation. Past due invoices are charged 18% interest per annum. By signing this agreement you also agree to personally guarantee any and all payment for services for related corporate or business tax preparation services you request from us. This engagement will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax

return. We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. If an engagement is terminated before services are completed, you agree to pay all fees and expenses we incur through the effective date of termination. Our firm maintains a five-year record retention policy.

Communication & SMS Consent By signing this engagement letter, I explicitly authorize **Knuff & Kunde CPAs** to send text messages to the mobile number provided.

- **Purpose:** Text messages will be strictly limited to client service matters, such as tax return status updates, urgent document requests, and appointment scheduling.
- **Privacy:** Your mobile number will **never** be shared with third parties or affiliates for marketing purposes.
- **Opt-Out:** I understand that I can revoke this consent at any time by replying **STOP** to any message.
- **Rates:** Standard message and data rates may apply.

View our full Privacy Policy at <https://www.knuffcpas.com/privacy-policy/>

If the foregoing sets forth your understanding, please sign a copy of this letter in the space indicated. We appreciate your confidence in us. Please call if you have questions.

Sincerely,



Accepted By:

Printed Name

Signature

Date

Printed Name, if filing joint

Signature

Date

Entities: _____