



2025 TAX PREPARATION ENGAGEMENT LETTER

We are pleased to confirm our understanding of the arrangements for preparation of your 2025 income tax return(s). This letter confirms the services you have asked our firm to perform and the terms under which we have agreed to do that work. Please read this letter carefully because it is important to both our firm and you that you understand the limitations of the services you have asked us to perform. If you have any questions regarding the contents of this letter, please contact us prior to signing it.

This engagement letter represents the entire agreement regarding the services described herein and supersedes all prior agreements (written or oral) regarding these services. It shall be binding on the heirs, successors and assigns of you and us. The Internal Revenue Service imposes penalties on taxpayers and on us as return tax preparers for failure to observe due care in reporting for income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements.

Filing Season and Deadlines Regarding Complete Documentation

We will begin accepting complete tax packages on Monday, February 16th, 2026 and our electronic filing season will begin on Monday, March 2nd, 2026. This is to allow for your collection of all documentation (W-2s, 1099s, 1098s, etc.) related to the complete preparation of your returns. Please send us your package when all documents have been received (to the best of your knowledge) and promptly provide us with any additional or corrected documents upon receipt. If you are providing a spreadsheet, please also email an electronic version for our records. **We do not automatically file tax extensions for clients - you must notify us in writing, email or fax if you wish for us to file an extension on your behalf. You must include an estimate of any balance due in your notification. Failure to pay any tax due with the extension or failure to pay quarterly estimated tax payments may make you subject to various penalties and interest.** We work on returns on a first in, first out basis. **If your complete tax information is not received in our office by March 23rd, 2026, we cannot guarantee the return will be prepared by the deadline, April 15th, 2026.** If we receive your tax packet with missing tax documents, an incomplete tax organizer, or are unable to reach you to discuss follow-up questions, there will be a delay in preparing your return and we cannot guarantee the return will be completed by the April 15th, 2026 deadline.

Documentation Required for Electronic Tax Filing

In order to comply with new e-filing regulations, a copy of your driver's license (and your spouse's, if married and filing a joint return) must be provided to us. We will be unable to e-file your returns without this information.

Tax Preparer Responsibilities

We will prepare your 2025 Federal and State(s) Individual Income Tax Form 1040 and related Federal and State(s) schedules only from the information you provide to us. We will not audit, review or compile, or otherwise verify the data you submit, although we may ask you to clarify some of the information. We are not responsible for returns prepared by other preparers. We may furnish you with a tax organizer and/or questionnaire to help you gather and organize the necessary information for us.

If you have taxable activity in a state other than your home state, you are responsible for providing us with all information necessary to prepare any additional applicable state(s) or local income tax returns as well as informing us of the applicable state(s).

We are responsible for preparing only the specific individual income tax forms referred to above. If additional forms/returns/services/actions are required, a written request must be made by you on a timely basis. Our services are not intended to determine whether you have filing requirements in taxing jurisdictions other than the one(s) requested above.

Taxpayer Responsibilities

Please note that any person or entity subject to the jurisdiction of the United States (includes individuals, corporations, partnerships, trusts and estates) having a financial interest in, or signature or other authority over bank accounts, securities or other financial accounts having an aggregate value exceeding \$10,000 in a foreign country, shall report such a relationship. Although there are some limited exceptions, filing requirements 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). Failure to disclose the required information to the U.S. Department of Treasury may result in substantial civil and/or criminal penalties. Such disclosure includes filing Form 8938 with your Form 1040 and a separate, electronic filing of Form FinCen114 required by the U.S. Department of Treasury on or before April 15th of each tax year. **If you do not provide our firm with information regarding any interest you may have in a foreign account, we will not be able to prepare any of the required income tax related forms and penalties may be due, for which we have no responsibility. In the absence of such information being provided, we will presume you do not have any foreign assets or financial interests and will not file any applicable disclosure forms without separate written authorization.**

In addition, currently, the Internal Revenue Service, under the IRC sections 6038 and 6046, requires the information reporting if you are an officer, director or shareholder with respect to certain foreign corporations (Form 5471); foreign-owned U.S. Corporation or foreign corporation engaged in a U.S. trade or business (Form 5472); U.S. transferor of property to a foreign corporation (Form 926); and if you hold foreign financial assets with an aggregate value exceeding \$50,000 (Form 8938). If you fall into one of the above categories you may be required to file one of the above listed forms, which are due at the time your income tax return is due, including extensions. Failure to timely file may result in substantial monetary penalties. By your signature below, you accept responsibility for informing us if you believe you fall into one or more of the above categories and you provide us with the information necessary to prepare the appropriate form(s). We assume no liability for penalties associated with the failure to file or untimely filing of any of these forms.

You acknowledge that you have reported all 2025 income you have received including (but not limited to) barter, crypto-currency, consumer-to-consumer activity, cash-based revenues and all other income, whether received in person, in-kind or electronically. You also confirm that you have or will timely file any applicable Form W-2 and W-3 with the Social Security Administration and IRS for any business employees and/or home workers.

Professional Fees and Billing Arrangement

Our fees for tax preparation services are based on the time required to complete your returns, the complexity of the tax matters involved, and the level of responsibility required.

Our minimum preparation fees are structured as follows:

Trusts and Business Entities: Minimum fee of \$850.

Individual Returns: Minimum fee of \$750.

Please note that these represent the baseline for standard filings. We reserve the right to adjust these fees upward based on the following factors:

Complexity: Fees will increase for returns involving multiple rental properties, foreign assets, intricate investment portfolios, or significant manual data entry.

Expedited Services: A "Rush Order" surcharge will apply to any information received within 7 days of the filing deadline to account for the additional resources required to meet the deadline.

Other Items

Our fee does not include responding to inquiries or examinations by taxing authorities or third parties, for which you will be separately billed for time and expenses involved. However, we are available to represent you, and our fees for such services are at our standard rates. You agree to immediately notify us upon receipt of any correspondence from any agency covered by this letter.

Please do not respond to or click on any links within emails purportedly from the IRS; the IRS never initiates correspondence by email (or telephone) and any such emails (or telephone calls) are attempts to steal your identity.

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 support of charitable contributions for three years from the filing date. It is also your responsibility to carefully examine and approve your completed tax returns before signing them for filing with the tax authorities. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for the resulting taxes, penalties and interest. We will rely, without further verification, upon information provided to us from 3rd parties including, but not limited to K-1's, 1099's, 1098's, receipts, and similar items. You are responsible for the proper recording of financial activities, for the safeguarding of assets, and for the substantial accuracy of your financial records. The law imposes various penalties when taxpayers understate their tax liability.

If you have donations of used goods to a charity, please provide us with a receipt from the organization, with the date of donation and your estimate of the value of the goods donated. This documentation is necessary for us to report the deduction on your return.

We will use our professional judgment in preparing your returns. Whenever we are aware that a possible applicable tax law is unclear or that there are conflicting interpretations of the law by authorities, we will explain the possible positions that may be taken on your return. We will adopt whatever position you request as long as it is consistent with the codes, regulations and interpretations that we have been promulgated. If the IRS should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties or assessments.

Please note that equity loans are not deductible unless the mortgage funds are used to buy, build or improve your personal residence and do not exceed the allowable mortgage debt. To comply with these new rules, we need to know any amounts borrowed against your home in 2019 and beyond, the date borrowed and the use of the funds. Without this information, we will be unable to deduct mortgage interest on the new borrowings.

Business Owners: When a self-employed taxpayer reduces taxable income, there is also a reduction in earned income reported to the Social Security Administration, which could reduce current and future benefits for the taxpayer and his or her dependents. You acknowledge and agree to the current tax reduction and the potential negative effects on future social security benefits for you, your spouse and any dependents.

Privacy laws established by the IRS (effective 1/1/2009) prohibit us from providing confidential information or copies of returns to anyone other than you. If a third-party requests information from us, we will send it directly to you and it will be your responsibility to forward it to the third-party. In addition, all files sent to you electronically will be securely encrypted. It is our policy to keep records of this engagement for three years, after which they are destroyed; however, it is the taxpayer's responsibility to retain and protect your records for three years.

Billings become delinquent if not paid within 30 days of the invoice date. If billings are not paid within 60 days of the invoice date, at our election, we may stop all work at our discretion until your account is brought current or we may withdraw from the engagement. You acknowledge and agree that we are not required to continue work in the event of your failure to pay on a timely basis for services rendered as required by this engagement letter. You further acknowledge and agree that in the event we stop work or withdraw from this engagement as a result of your failure to pay on a timely basis, we shall not be liable to you for any damages that occur as a result of our ceasing to render services.

In recognition of the relative risks and benefits of this agreement to both the client and the accounting firm, the client and the accounting firm have discussed and have agreed on the fair allocation of risk between them. As such, the client agrees, to the fullest extent of the law, to limit the liability of the accounting firm to the client for any and all claims, losses, costs and damages of any nature whatsoever, so that the total aggregate liability of the accounting firm to the client shall not exceed the accounting firm's total fee for services rendered under this agreement. The client and the accounting firm intend and agree that this limitation applies to any and all liability or cause of action against the accounting firm, however alleged or arising, unless otherwise prohibited by the law. Both parties agree that there is a one-year limited period to bring a claim against us for errors and omissions. The one-year period will begin upon the date of the tax professional's signature on the tax return(s) covered by this engagement.

From time to time, various third parties may request that we sign for you some verification of income, employment or tax filing status. Because we were engaged only to prepare your income tax return, without examination, review, audit or verification, our insurance carriers, as well as the state board of accountancy prohibit us from signing any such document and we suggest that you have them send IRS Form 4506 to the IRS to obtain such verification.

We truly appreciate the opportunity to serve you. Please sign, date and return this letter to us to acknowledge your agreement with and acceptance of your responsibilities and the terms of this engagement. If any provision of this agreement is declared invalid or unenforceable, no other provision of this agreement is affected and all other provisions remain in full force and effect. If you send your tax materials to us without returning the signed and dated engagement letter, the agreement will be deemed to have been signed and will be in full force and effect.

Kind Regards,

Acorn Tax Planning, Inc.

I (we) have read the above terms of the engagement letter and agree with the terms of this engagement.

Taxpayer Signature	Date
Spouse Signature	Date

2025 TAX RETURN QUESTIONNAIRE

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2025 income tax return. **Please remit a copy of your 2024 tax returns (if we did not prepare or if we do not already have in our possession) with the below questionnaire completed.**

I (we) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct, and complete to the best of my (our) knowledge.

Taxpayer Signature	Date
Spouse Signature	Date

DIRECT DEPOSIT

If you would like your tax refund (if any) deposited directly into your bank, **please provide a voided check** and verify your account information here:

Name of Bank	
Routing Transit Number	
Account Number	
Account Type	

PERSONAL INFORMATION

Taxpayer		Spouse (If Applicable)	
SSN #		SSN #	
DOB		DOB	
Occupation		Occupation	
Home Phone #		Home Phone #	
Cell Phone #		Cell Phone #	
Email Address		Email Address	
Marital Status 2025		Marital Status 2025	

DEPENDENTS

Dependents	#1	#2	#3	#4
Name				
SSN #				
DOB				
Relationship				
Months Lived at Home				
Gross Income				

ESTIMATED TAX PAYMENTS MADE

	Federal	State		Federal	State
1 st Quarter			3 rd Quarter		
2 nd Quarter			4 th Quarter		

INCOME

Type of Income	Form(s) to Attach	# Attached	Payer Name and Notes
Wages & Salary Income	Form W-2s		
Pensions, Annuities, Profit Sharing, IRAs, Rollovers, etc.	Form(s) 1099-R Form 5498		
Social Security, Railroad Benefits	Form(s) SSA-1099		
Interest Income	Form(s) 1099-INT & Broker Statements		
Dividend Income	Form(s) 1099-DIV		
Partnership, Trust, Estate Income	Form(s) K-1		
Investments Sold / Capital Gains & Losses	Form(s) 1099-B Or provide statement with date acquired, date sold and sale price		

MISCELLANEOUS INCOME FOR 2025

Type	Amount
Unemployment Income – Attach Form 1099G	
State and Local Tax Refund – Attach Form 1099G	
Foreign Earned Income	
Alimony Received <i>Date of Divorce:</i>	
Third-Party Network (Venmo, Stripe, Paypal) - Attach Form 1099-K	
Commissions	
Scholarships/Grants	
Royalty Income	
Jury Duty Income	
Gambling, Lottery	
Unreported Tips	
Worker's Compensation	
Disability Income	
Other - Attach Form 1099-MISC, 1099-NEC	

PROPERTY SOLD – Attach 1099-S and Settlement Statements

Property	Date Acquired	Cost	Improvements	Date Sold	Proceeds
*Primary					
Vacation					
Land					
Other					

*Provide information on improvements, prior sales of home, and cost of a new residence.

ADJUSTMENTS & DEDUCTIONS

Type	Amount
IRA/SEP/Roth Contributions – Taxpayer <input type="checkbox"/> Made in 2025 <input type="checkbox"/> Made in 2026 <input type="checkbox"/> Roth <input type="checkbox"/> Traditional	
IRA/SEP/Roth Contributions – Spouse <input type="checkbox"/> Made in 2025 <input type="checkbox"/> Made in 2026 <input type="checkbox"/> Roth <input type="checkbox"/> Traditional	
Alimony Paid	
<i>Name & SSN of ex-spouse</i>	
<i>Date of Divorce</i>	
Self-Employed Insurance Premiums Paid	
Penalty for Early Withdrawal of Retirement Savings	
Health Savings Account (HSA) or Medical Savings Account (MSA) Contributions - Attach Form 8889	
2025 HSA or MSA Distributions	

COLLEGE SAVINGS ACCOUNT CONTRIBUTIONS

Beneficiary	Account Number	Account Type	Amount
		<input type="checkbox"/> State 529 <input type="checkbox"/> Private 529 <input type="checkbox"/> Coverdell ESA	
		<input type="checkbox"/> State 529 <input type="checkbox"/> Private 529 <input type="checkbox"/> Coverdell ESA	
		<input type="checkbox"/> State 529 <input type="checkbox"/> Private 529 <input type="checkbox"/> Coverdell ESA	

EDUCATION EXPENSES & DEDUCTIONS

Type	Amount
Tuition & Fees Paid Attach Form 1098-T tuition statement provided by institution and Bursar account statement	
Room & Board	
Books & Computer - Attach Receipts	
Qualified Student Loan Interest Paid - Attach Form 1098-E	
Payments from Qualified Education Program – Attach Form 1099-Q	

MEDICAL EXPENSES

Type	Amount
Prescription Medicines and Drugs	
Total Medical Insurance Premiums Paid*	
Long-Term Care Expenses	
Number of miles traveled for medical care	
Lodging	
Doctors, Dentists, Orthodontists, etc.	
Hospitals	
Lab Fees	
Medical Equipment, Supplies, Hearing Aids	
Eyeglasses and contacts	

* Do not include Medicare premiums or premiums deducted in computing taxable wages reported on a W-2

TAXES & INTEREST PAID IN 2025

Type	Amount
Home mortgage interest paid to financial institutions – Attach Form 1098	
Home mortgage interest paid to individuals <i>Name/Address</i>	
Amount Borrowed Against Home in 2018 <i>Date/Use of Funds</i>	
Points paid on purchase or refinance (include closing statement)	
Real estate taxes not listed elsewhere – Attach copies of all related bills	
Personal Property Taxes - Attach copies of all related bills	
Foreign Taxes Paid – Attach details	

CHARITABLE CONTRIBUTIONS – Please provide written acknowledgement for all cash donations over \$250. For any noncash contributions, please provide receipt from the non-profit organization with your date of contribution and your best estimate of the fair market value of items donated. Please include Form 1098-C for the donation of a car, boat, etc.

Type (ex: Church, Cancer, Wildlife Fund)	Organization Name	Amount
Cash		
Noncash		

CASUALTY/THEFT LOSS

Property Location	Property Description	Amount	Insurance Reimbursement	Repair Costs	Federal Grants Received	Fed Declared Disaster Losses

CHILD AND DEPENDENT CARE

	Provider 1	Provider 2
Name		
Address		
EIN/SSN		
Amount Paid		
Children Cared for		

BUSINESS INCOME

Business Name	
Product/Service	
Address (if different)	
Entity Type	<input type="checkbox"/> Self-Employed <input type="checkbox"/> Sole-Proprietor LLC <input type="checkbox"/> Partnership LLC <input type="checkbox"/> S-Corp <input type="checkbox"/> C-Corp

2025 Revenue*		2025 Inventory (Cost of Goods Sold)			
Total Sales	\$	Inventory: Beg.	\$	Purchases	\$
Returns & Refunds	\$	Inventory: End	\$	Personal Use	\$

*Include any Form 1099-K to report payment card and third-party transactions

BUSINESS USE OF HOME Do you use any part of your home regularly and exclusively for business? Yes No

Estimated percentage of time spent in home office compared to total time spent in this business activity?	
Description of work done in home office	
Total Area of Home (Sq Ft)	
Total Area of Home Used for Business	

BUSINESS EXPENSES WORKSHEET *These categories may require you to issue a 1099-MISC for payments made to anyone for \$600 or more. Contact us.

Expense	Amount	Expense	Amount	Expense	Amount
Accounting*		Office expenses (not rent)		Sales Tax	
Advertising & Marketing*		Rent (business only)		Payroll Taxes	
Bank Charges		Computer		Personal Property Taxes	
Commissions*		Software		Real Estate Taxes	
Independent contractor		Salaries & Wages*		Heat & Elec.	
Consulting*		Payroll expenses		Water & Sewer	
Dues & subscriptions		Pension & Profit-sharing		Trash	
Gifts (limit \$25 per client)		Parking: Fees & tolls		Internet: Business use only	
Education & Training		Postage & shipping		Meals & Entertainment	
Janitorial*		Printing*		Travel: Airfare	
Licenses		Equip. rental or lease*		Travel: Auto Rental	
Legal & Professional Fees*		Repairs & Upkeep*		Travel: Lodging	
Property Insurance		Tools		Phone: Business use only	
Liability Insurance		Supplies		Other:	
Workers Comp.		Uniforms		Other:	

BUSINESS MILEAGE - In order to deduct mileage for auto expenses in a tax return, a log must be kept which details mileage driven for business purposes. This log, or something which keeps track of mileage, would be needed to justify the write off for the expense in the event of an audit.

Do you have written records? Yes No

Did you sell or trade in a car used for your business? If yes, include a copy of the purchase agreement. Yes No

	Car 1	Car 2
Make/Mode		
Year		
Date Purchased		
Total Miles (personal and business)		
Business miles (not to and from work)		
Miles after June 30		
Education (one way, work to school)		
Job Seeking		
Other Business		
Round Trip Commuting Distance		
Gas, Oil, Lubrication		
Batteries, Tires, etc.		
Repairs		
Insurance		
Interest		
Lease Payments		
Garage Rent		

RENTAL INCOME

*Property Type	Full Address
1.	
2.	
3.	

Revenue & Usage	Property 1	Property 2	Property 3
Rental Income			
Personal Use Days			
Related Expenses	Amount	Amount	Amount
Advertising			
Cleaning & Maintenance			
Commissions			
Insurance			
Legal & Professional Fees			
Management & HOA Fees			
Mortgage Interest			
Repairs			
Supplies			
Property Taxes			
Phone			
Utilities			
Water & Sewer			
Trash			
Lawn Care			
Snow Removal			
Mileage			
Other			
Purchases*			
Improvements*			
Replacements*			

***For major expenses, include receipts/invoices detailing the description, price and date.**

Request	Response
Do you want to file your tax return electronically?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Can the IRS and state tax authority discuss questions about this return with the preparer?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you expect a large fluctuation in your income, deductions or withholding in 2026? This will help us calculate possible changes to estimated tax payments. If yes, provide details.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Can you or your spouse be claimed as a dependent by another taxpayer?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse or dispose of any stock acquired under a qualified employee stock purchase plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No
In 2025, did you or your spouse have a foreign bank account over \$10,000 at any time of the year? If so, please provide name and address of the foreign bank, type of account, account number and maximum value during 2025.	<input type="checkbox"/> Yes <input type="checkbox"/> No
In 2025, did you or your spouse receive any non-taxable military benefits?	<input type="checkbox"/> Yes <input type="checkbox"/> No
In 2025, did you or your spouse sell anything for a profit over the internet (ex: Ebay, Craigslist, Amazon, Etsy)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
In 2025, did you or your spouse start or purchase a business, rental property, or farm? If so, please provide details (ex: was there any business or rental income generated in 2025?).	<input type="checkbox"/> Yes <input type="checkbox"/> No
In 2025, did you or your spouse rollover or convert any IRAs or retirement accounts?	<input type="checkbox"/> Yes <input type="checkbox"/> No
In 2025, did you or your spouse receive (as a reward, award or compensation) or sell, exchange, or otherwise dispose of a digital asset or a financial interest in a digital asset? If yes, provide details. A digital asset is any virtual currency of value that functions as a medium of exchange, a unit of account and/or a store of value. Cryptocurrency, such as Bitcoin, is an example of a digital asset.	<input type="checkbox"/> Yes <input type="checkbox"/> No

<p>If over age 70½, did you or your spouse make a contribution from your IRA directly to a charitable organization?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children, or grandchildren? If so, please provide 1099 and qualifying expenses.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you or your spouse buy or sell a residence, rental property, or personal property such as a motor vehicle or boat? If so, please provide the closing documents (Settlement Statement) as well as the date of your move and state you moved out of/into (if applicable).</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you or your spouse have a balance borrowed against a home equity line of credit or a total mortgage indebtedness in excess of \$750,000? If so, please provide the outstanding principal balance as of 12/31/2025.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you or your spouse contribute property (other than cash) with a fair market value of more than \$5,000 to a charitable organization? If Yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you refinance any existing loans on your home or other real estate you own? If yes, provide the settlement statement (Closing Disclosure).</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you or your spouse make any energy-efficient improvements (solar panels, heat pumps, energy-efficient windows/doors, etc) to your main home or vacation home? If yes, provide details. These credits (25C and 25D) are set to expire on December 31, 2025. Please ensure you have 'placed in service' documentation for this year.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you or your spouse have a casualty or theft loss and you were not fully compensated?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Did you or your spouse serve in the military or were you or your spouse on active duty?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you or your spouse pay additional taxes as a result of an audit or late filing penalties?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No

<p>Did anyone in your family receive a scholarship of any kind during 2025? If yes, please supply details.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, did you or your spouse make any gifts in excess of \$19,000 to one donee? The gift(s) could have been made directly, indirectly or to a trust.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Has the IRS, or any state or local taxing agency, notified you of changes to a prior year's tax return in which you have not already notified us (including a partnership or LLC in which you have an investment)? If yes, provide copies of all notices or correspondence received.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Did you, your spouse, or any of your dependents receive an identity protection personal identification number (IP PIN) from the IRS or have you been a victim of identity theft, either in 2025 or in prior years? If you received an IP PIN, provide a copy of the IRS notice.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>In 2025, Did you purchase a clean energy (electric) vehicle? If yes, provide the purchase invoice and note whether new or used. Note: Federal credits for new/used EVs officially ended on September 30, 2025.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Did you or your spouse receive any forgiveness of debt during the year, including cancelation of student loans or other indebtedness during the year? (foreclosures, bankruptcies, credit card forgiveness) If yes, provide details.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Did any of your dependents have unearned income of \$1,350 or more (\$400 if self-employed)? If yes, do you want us to prepare your child's tax return? Please let us know if you would like to discuss.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Did you, or do you plan to, contribute money before April 15, 2026, to a traditional or Roth IRA for the last calendar year? If yes, provide details (note that some states may have earlier due dates).</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>If you or your spouse have self-employment income, do you want to make a retirement plan contribution? Please let us know if you would like to discuss the potential tax savings.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Did you surrender any U.S. savings bonds, or did they mature?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No

Did you acquire or dispose of any interests in partnerships, LLCs, S corporations, estates or trusts this year? If yes, provide the Schedule K-1 that the organization has issued to you.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you or your spouse receive income for tips? If Yes, was it reported on a W-2, 1099-K, 1099-NEC, or Form 4317? If unreported, was it \$20 or more in any month?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you receive 'time-and-a-half' or other premium overtime pay in 2025? If yes, please provide the total amount of the premium portion (the extra 50% rate) earned. (Note: Up to \$12,500 for individuals / \$25,000 for joint filers may be deductible.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you or your spouse pay interest on a new passenger vehicle purchased in 2025 that was assembled in the U.S? If so, provide the vehicle identification number (VIN) of the vehicle. (Note: Deduction is capped at \$10,000 and subject to income phase-outs.)	<input type="checkbox"/> Yes <input type="checkbox"/> No