

David Carroll CPA, PLLC
121 S. 5th Street, Wills Point, Texas 75169

Date: 12/05/2024 CST

Client: Wills Point ISD Education Foundation EIN: 82-2527104

Attn: Kate Keierleber

Email: kate.keierleber@wpisd.com

Address: 338 W. North Commerce St. Wills Point, TX 75169

Phone: 903-873-5100

Engagement to Prepare Income Tax Return Form 990 for Client named above Tax Return Preparation

Services

Dear Client,

We are pleased to confirm our engagement to prepare the Wills Point ISD Education Foundation Form 990 income tax return for the year ended 2023. We will perform our services in accordance with the applicable professional statements, standards, and regulations. This firm is responsible for preparing only the return listed above.

Our services and fees include only the preparation of your tax return and does not include additional services such as audit representation or preparing materials to respond to correspondence from taxing authorities.

Our fees for preparing the income tax returns for you will be **\$85/hour**. We request that fees be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for the reasonable value of work completed.

The engagement to prepare your 2023 tax return terminates upon delivery of your completed return and original documents to you. Please store your supporting documents and copies of your tax return in a secure place for at least the four-year IRS statute for auditing your tax return. Consult your risk management professional to determine retention requirements for your jurisdiction.

Taxpayer Responsibilities

You agree to provide to us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information. You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will also ask to review your documentation. You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority and we can provide guidance concerning what evidence is acceptable.

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 a value exceeding \$10,000 in a foreign country, shall report such a relationship. If you have a financial interest in, or signature authority over, any foreign accounts, you are responsible for providing David Carroll CPA, PLLC with all the information necessary to prepare the Report of Foreign Bank and Financial Accounts (FBAR) required by the U.S. Department of the Treasury for the FBAR to be received by the Department on or before April 15th of each tax year. Electronic filing of FBAR reports is mandatory using the Bank Secrecy Act (BSA) e-filing system for the Financial Crimes Enforcement Network (FinCEN). If you would like David Carroll CPA, PLLC to submit your electronic FBAR report (FinCEN Form 114) on your behalf, we must receive a signed consent form (FinCEN Form 114a) from you prior to submitting the foreign reporting form. If you do not provide David Carroll CPA, PLLC with information regarding any interest you may have in a foreign account, or if we do not receive your signed authorization to file your foreign reporting form, we will not be able to prepare and file any of the required disclosure statements.

All information necessary to complete preparation of the income tax returns must be received by us no later than two weeks prior to the applicable due date of the income tax returns to ensure timely completion of those returns.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.

In the event of any dispute arising out of, or relating to, this engagement, the parties will first attempt in good faith to settle the dispute through non-binding mediation administered by the American Arbitration Association under its mediation rules, before resorting to litigation or similar actions.

It is your responsibility to review your return carefully before signing to ensure the information is correct. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax return as explained above.

We look forward to working with you and enjoying a mutually beneficial relationship.

☐ Printed copy of my return. ☐ Electronic copy of my return.

Very truly yours,

David Carroll CPA, PLLC

David Carroll CPA, PLLC

Agreed and acknowledged:

Kate Keierleber

Signer ID: CUMFMVCM11...

Client signature

Signature Certificate



Envelope Ref:90f0476f564358f5a28fc003e51f34585fcd814b

Author: Brianna Sewell Creation Date: 22 Nov 2024, 11:02:44, CST Completion Date: 05 Dec 2024, 08:13:06, CST

Document Details:



Name: Wills Point ISD Education Foundation 2023 990 CEL

Type:

Document Ref: 61729765022a708bb329203dc1a575092eb804ba1ceed699dc1388a890e027c7

Document Total Pages: 2

Document Signed By:

Name: Kate Keierleber
Email: kate.keierleber@wpisd.com
IP: 209.249.72.60
Location: WILLS POINT, TX (US)
Date: 05 Dec 2024, 08:13:06, CST
Consent: eSignature Consent Accepted
Security Level: Email

Kate Keierleber
Signer ID: CUMFMVCM11...

Document History:

Envelope Created	Brianna Sewell created this envelope on 22 Nov 2024, 11:02:44, CST
Invitation Sent	Invitation sent to Kate Keierleber on 22 Nov 2024, 11:03:21, CST
Invitation Accepted	Invitation accepted by Kate Keierleber on 05 Dec 2024, 08:12:51, CST
Signed by Kate Keierleber	Kate Keierleber signed this Envelope on 05 Dec 2024, 08:13:06, CST
Executed	Document(s) successfully executed on 05 Dec 2024, 08:13:06, CST
Signed Document(s)	Link emailed to kate.keierleber@wpisd.com
Signed Document(s)	Link emailed to briannas@dauidcarrollcpa.com
Signed Document(s)	Link emailed to debi@dauidcarrollcpa.com