

Holmquist Ltd.
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Engagement Letter

Services to be performed by Holmquist Ltd for tax year 2025

Holmquist Ltd (Holmquist) will prepare your 2025 individual income tax returns. In this agreement, you are referred to as Client. **Holmquist service goal is lowering Client's tax while helping Client remain in compliance with IRS.**

Limitations of services:

Tax regulations and rulings constantly change. Holmquist will follow these regulations and rulings, but cannot guarantee tax returns will be accepted as filed. Client, not Holmquist, is responsible for accuracy of Client records and safety of Client assets. Client, not Holmquist, is responsible for detecting or preventing errors, fraud, illegality, loss, mistakes, misappropriation, and theft. Client, not Holmquist, is responsible for reducing risk to Client's business and assets. Holmquist is not compiling, reviewing, or auditing Client's financial statements and financial records. Holmquist will aim to protect Client privacy and Holmquist will only release information to third parties upon permission from Client. Holmquist is required to release information to tax authorities.

Other services:

Holmquist can provide services to Client beyond individual income tax preparation. However, Holmquist is only responsible for specific services requested by Client and agreed to by Holmquist. Client may need specialized services beyond the capabilities of Holmquist.

Fees:

Holmquist fees are based on the complexity of work to be performed or work completed at an agreed upon fee by Holmquist and Client.

Ultimate responsibility:

Client is ultimately responsible for complying with substantive or procedural tax law which applies to Client, and for ensuring Client tax returns and any required tax payments are timely received by the appropriate tax authority. Notwithstanding any term of this Agreement, this responsibility can not be delegated to Holmquist.

Agreement:

If Client agrees with the services, limitations, and fees in this letter, please type names, save document and electronically return to Holmquist or print, sign and mail with tax materials.

Taxpayer

Spouse

Tax Year 2025 Required Documentation

Use this tax organizer to assist in gathering your 2025 individual income tax information.

VERIFY ALL TAX PAYMENTS BEFORE REPORTING TO HOLMQUIST

Review organizer and collect the following if applicable.

- Forms W-2
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements and 1099-B showing investment transactions for stocks, bonds.
- Schedule K-1 from partnerships, S corporations, estates and trusts.
- Statements supporting educational expenses, deductions or distributions, Forms 1098-T, 1098-E, or 1099-Q.
- All Forms 1095-A, 1095-B, 1095-C, 5498SA and 1099SA related to health care coverage.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions.
- Copies of closing statements regarding the sale or purchase of real property.
- Documentation of your business income and expenses including mileage, pension plan, equipment, meals, telephone, home office, furniture, travel, supplies, subscriptions, internet and insurance.
- Any tax notices sent to you by the IRS or other taxing authority.

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