Dear Client,

Thank you for choosing Stevens Accounting LLC] to complete your tax return this year. We look forward to working with you.

In the letter below, you will find the terms, nature, and extent of the services to be provided, and you will be asked to confirm your understanding of any mutual responsibilities.

Please **read** the letter below and **sign**, so we can begin working on your return.

Important Deadlines

April 1, 2026 — Deadline to submit your tax information to Stevens Accounting.
April 15, 2026 — Deadline to pay and file tax returns or extensions.
If information is received after April 1, 2026, you may be subject to being charged an additional fee of $75.

Your federal and/or state tax returns will be prepared with the information you provide. You will Stevens Accounting with complete and accurate information up front. Stevens Accounting will keep the information you provide confidential. Services will be provided only as needed to prepare your tax return(s). No audit or verification of the submitted data will occur. However, Stevens Accounting will follow up to request clarification and/or documentation of information as needed. You will also be notified should any material errors, fraud, or other illegal acts be discovered.

You are responsible for reporting any foreign activities upon signature. By signing this letter, you acknowledge that you will inform us of any income from foreign sources or if you have signatory authority over any foreign financial accounts. If you are still determining whether income/accounts are foreign, please disclose this regardless so we can review it. Failure to report these types of activities will result in severe penalties.

You will be responsible for providing all necessary documentation required by law to support your data. This includes expenses for gifts, travel, vehicle use, meals, charitable contributions, and so forth. If you need clarification on what documentation is required at any given time, please reach out to discuss further. Professional judgment will be used to resolve issues when tax law is unclear or when there is conflict among authorities. But you, the taxpayer, have the final responsibility for your tax return(s). Therefore, it is imperative that you carefully review all documents before signing and filing them.

Stevens Accounting may also provide a checklist for you to complete up front, which will ensure we collect your most up-to-date information. Completion is optional, but it can help remind you what items are needed. Nonetheless, upon signature, please provide originals/copies of originals for all government tax documents (W-2s, 1099s, 1098s, and

(OVER)

property tax statements). All records will be returned to you (if picked up) or should be picked up (if dropped off) after finishing serving you. We recommend you store them securely, as well as supporting documents, in case they are needed later in the tax preparation process. Stevens Accounting will retain copies of all tax returns for 7 years, after which these returns will be securely disposed of/destroyed.

Please remember that if we are preparing a joint return for you and your spouse, tax returns and copies of all supporting documents will be made available to both spouses without the other spouse's consent or notification.

The filing deadline for tax returns is April 15, 2026, All information must be received by April 1, 2026, to meet the filing deadline. If additional time is needed, you must request us to prepare the extension. Please remember that to prepare a valid and accurate extension, we may ask for additional information. You will also need to expressly approve filing an extension before this can be done on your behalf. As a reminder, an extension only provides you with additional time to file, not to pay. Taxes paid after April 15, 2026, will result in late fees and interest.

Tax preparation fees will be charged based on the complexity of work and will be quoted before the start of any work. Should any complications arise as your tax return(s) are being prepared, fees may be adjusted accordingly. Invoices are due and payable by the completion of each return. Important reminder: Tax returns will only be filed electronically after fees are paid in full.

Should the IRS or state tax authorities audit your return, please let us know immediately (as soon as letters are received from the IRS/any other tax agency), so we can react accordingly and be available to assist you. If you failed to get us the required information or gave us incorrect information which resulted in an audit, you will be responsible for any taxes owed, in addition to any fees for correction.

This agreement will conclude at the time completed returns are delivered to you (paper-filing), or upon signature and submission of your tax return(s) (e-filing).

Under federal and North Carolina law, as an IRS efile provider, Stevens Accounting is required to file your returns electronically. However, you can opt out of electronic filing without explanation. If you prefer not to e-file, please contact us directly, so we can provide you with the government opt-out forms. These must then be signed and returned to Stevens Accounting.

To agree with this letter and its summary of our arrangement, please sign below and return it in person or electronically. Work will not begin until a signed copy of this engagement agreement is returned. Should you be filing a joint return, both spouses are required to sign.

Thank you for putting your trust in Stevens Accounting. Please do not hesitate to reach out if you have any questions or concerns.

All the best,
Stevens Accounting LLC

Acknowledged by:

Signature: ______________________	Signature: ______________________
Print name: ______________________	Print name: ______________________