



2023 Tax Engagement Letter

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the tax services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements:

Walls Financial Group (WFG) will prepare your 2023 federal and state income tax returns based on information you provide to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information.

We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of these forms will assist in keeping your fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority in the future. Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them. Please let us know if you have any questions as you review them in detail.

Our fee for these tax services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. Invoices for our tax preparation services are due and payable upon presentation. The Client understands, acknowledges and agrees that WFG is not required to release, electronically transmit or otherwise file any return(s) with the appropriate tax authority unless and until full payment has been received. In the event that the Client fails or refuses to pay, the Client shall be responsible for paying all fees and expenses incurred in connection with its pursuit of collection, including, but not limited to, payment and/or reimbursement of reasonable attorneys fees.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. 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. We will provide a separate invoice for this additional fee.

At all times during and subsequent to its performance of this Agreement, WFG agrees to keep non-public information provided by the Client confidential to the extent practicable. WFG is permitted to share any information necessary to carry out its obligations under this Agreement. WFG may not be held liable for disclosing confidential information if compelled to do so by a court, administrative agency or governmental authority, or in connection with any collection action by WFG for unpaid fees. This Agreement is governed by New York law.

If you understand and agree to these terms, please sign this letter in the space indicated and upload it to our secure platform or returned the signed, printed copy to our office. If there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

WALLS FINANCIAL GROUP LLC

Taxpayer Name: _____ Date: _____

Taxpayer Signature: _____

Joint Taxpayer Name: _____ Date: _____

Joint Taxpayer Signature: _____