Haukeness Tax & Accounting Inc

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2025 Tax Year Engagement Letter for Tax Return Preparation

Client(s):_____/_____
Taxpayer or Business Name / Spouse Name

Thank you for giving Haukeness Tax & Accounting Inc the opportunity to work with you this tax season. Please note that signed Engagement Letters are required for tax return preparation. This Engagement Letter is designed to confirm the terms of our services and both our and your responsibilities during this process. **It is important that you read, sign, and return this Engagement Letter with your tax documents and questionnaire.**

Tax Services

We will prepare your federal and state individual income tax returns from information you furnish us. By signing, you confirm that the information provided is accurate and complete to the best of your knowledge.

Our policy is to process tax returns in the order that they are received per season. It is important that we receive your documents as soon as possible for timely filing.

For 1040 tax returns, we must receive all information needed to prepare your returns by March 25, 2026 to ensure that your returns will be filed by April 15, 2026. If we have not received all of your information by March 25, 2026, we cannot guarantee that your return will be completed before the deadline. If we are unable to complete the returns, we will assume that you want us to prepare an extension of time to file your returns. You will need to provide us with your authorization before we can file the extension on your behalf. You should keep in mind that this would be an extension of time to file the returns; however, any tax estimated to be due would need to be paid with the extension request. We assume no liability for late filing or late payment penalties. You agree to mail any items to the IRS or state in a way that can be tracked. We assume no responsibility for mail not getting to the IRS or state after it is mailed.

We will return your original records to you at the end of this engagement. You should retain all the documents, books, and records that form the basis of your income and deductions. The documents may be necessary to prove the accuracy and completeness of the returns to a taxing authority. If you have any questions as to the type of records required, please ask us for advice.

We will perform accounting assistance or tax research necessary to complete the tax preparation at an additional charge of $75/hour.

We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

We will not be responsible for penalties and/or interest charges that you might incur if you have not met your tax liability by the due date of the return. Whenever possible, we will attempt to advise you if we project that you may have any unmet tax liability.

Where tax law is ambiguous or unclear, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. If a taxing authority should later contest the position taken, there may be an assessment of additional tax, interest and penalties. We assume no liability for any such assessment of additional tax, penalties or interest. In the event, however, that you ask us to take a tax position that in our professional judgment will not meet the applicable laws and standards as promulgated, we reserve the right to stop work and shall not be liable for any damages that occur as a result of ceasing to render services.

We reserve the right to withdraw from this engagement at any time for any reason. You have the right to terminate this engagement at any time.

If your income tax return includes income from a business, farm, farm rental, or other rental activity you consent that you have authorized our business to file or you have filed on your own all required 1099's for any individual or business expense that is deducted on your income tax return.

Please note that the Internal Revenue Service ("IRS") considers virtual currency (e.g., Bitcoin) and other digital assets (e.g., NFTs) as property for U.S. federal tax purposes. As such, any transactions in, or transactions that use, virtual currency or crypto assets are subject to the same general tax principles that apply to other property transactions. If you had any crypto assets or virtual currency activity during the tax year, you may be subject to tax consequences associated with such transactions and may have additional foreign reporting obligations.

If you and/or your entity have a financial interest in, or signature authority over, any foreign accounts, you may be subject to certain filing requirements with the U.S. Department of the Treasury, in addition to the Internal Revenue Service (IRS). Filing requirements may 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).

Taxing authorities require us to electronically file all federal and state individual income tax returns ("e-filing"). However, you do have the right to "opt out" of the e-filing program. Please notify our firm immediately should you desire not to have your returns e-filed so that we may provide you with the form(s) necessary for opting out of the e-file program. Please note that unless you notify us of your desire to not e-file your returns, we will prepare your returns to be e-filed.

Although e-filing requires both you and our firm to complete additional steps, the same filing deadlines will apply. You must therefore ensure that you complete the additional requirements well before the due dates in order for our firm to be able to timely transmit your returns. We will provide you with a paper copy of the income tax returns for your review prior to electronic transmission. After you have reviewed the returns, you must provide us with a signed authorization indicating that you have reviewed the returns and that, to the best of your knowledge, you feel they are correct. We cannot transmit the returns to the taxing authorities until we have the signed authorization. If you have not provided our firm with your signed authorization, we will place your returns on extension, even though the tax returns have been completed. In that event, you will be responsible for ensuring that any payment due with the extension is timely sent to the appropriate taxing authorities. You will also be responsible for any additional costs our firm incurs arising from the extension preparation.

Finally, please note that although our firm will use our best efforts to ensure that your returns are successfully transmitted to the appropriate taxing authorities, we will not be financially responsible for

electronic transmission errors or other errors arising after your return has been successfully submitted from our office.

By your signature below, you understand and agree that you are responsible for the accuracy and completeness of the records, documents, explanations, and other information provided to us for purposes of this engagement. You have the final responsibility for the income tax returns; therefore, you should review them carefully before you sign the e-file authorization forms, or sign and submit your income tax returns directly to the appropriate taxing authorities. You agree that our firm is not responsible for a taxing authority's disallowance of deductions or inadequately supported documentation, nor for resulting taxes, penalties, and interest.

Fees

All preparation fees are invoiced per tax return per tax year.

Tax preparation fees are due at the time the return is complete and before the tax return will be e-filed with the appropriate authorities.

Our fee is based on the forms required to complete your return. If you terminate this engagement before completion, you agree to pay the higher of a $50.00 terminating fee or for actual time and expenses incurred prior to the date of termination, even if the tax return(s) are not completed.

Below is a list of starting fees by tax return type. Your tax return fee will be based on tax return type, complexity, and additional time team members spend prepping the return. By signing your name, you agree to this fee structure and the understanding that the fee structure may change.

	1040	1040 - Homestead	1041/Entity/990	Amended Return	Consulting Fee	Additional Printing Fee
2026 Fee	$100	$50	$500	$50	$75/hour	$25/year

In the event the client has any past due balances, we reserve the right to cease working on your tax return(s) or providing any other services until the balance has been paid in full or other acceptable payment arrangements have been made.

Past due balances of more than 30 days are subject to interest charge to the extent permitted by state law.

In the event you need an additional copy of your tax return or any supporting documents, a $25 charge will be applied per tax return per tax year.

Other Matters

It is our policy to keep records related to this engagement for three years. However, Haukeness Tax does not keep any original client records, they will be returned to you at the completion of the services rendered under this engagement. It is your responsibility to retain and protect your records (which include any work product we provide to you as well as any records that we return) for possible future use, including potential examination by any government or regulatory agencies. Haukeness Tax does not accept responsibility for hosting client information; therefore, you have the sole responsibility for ensuring you retain and maintain in your possession all your financial and non-financial information, data and records.

If any dispute arises among the parties hereto, the parties agree to first try in good faith to settle the dispute by mediation under its applicable rules for resolving professional accounting and related services disputes before resorting to litigation. Costs of any mediation proceeding shall be shared equally by all parties.

Client and accountant both agree that any dispute over fees charged by the accountant to the client will be submitted for resolution by arbitration in accordance with the applicable rules for resolving professional accounting and related service disputes, except that under all circumstances the arbitrator must follow the laws of Wisconsin. Such arbitration shall be binding and final. IN AGREEING TO ARBITRATION, WE BOTH ACKNOWLEDGE THAT, IN THE EVENT OF A DISPUTE OVER FEES CHARGED BY THE ACCOUNTANT, EACH OF US IS GIVING UP THE RIGHT TO HAVE THE DISPUTE DECIDED IN A COURT OF LAW BEFORE A JUDGE OR JURY AND INSTEAD WE ARE ACCEPTING THE USE OF ARBITRATION FOR RESOLUTION. The prevailing party shall be entitled to an award of reasonable attorneys' fees and costs incurred in connection with the arbitration of the dispute in an amount to be determined by the arbitrator.

PLEASE SIGN AND RETURN THIS LETTER TO INDICATE YOUR ACCEPTANCE BY ALL PARTIES OF THE TERMS OUTLINED ABOVE.

Sincerely,

Haukeness Team

Accepted By:

_____	_____	_____	_____
Taxpayer's Signature	Date	Spouse's Signature	Date