

LUMINE TAX SERVICE, LLC

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Subject: Tax year 2023 Agreement letter

Thank you for choosing LUMINE TAX SERVICE, LLC to assist you with your 2023 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2023 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. A checklist and questionnaire are provided to help collect the data required for your return. Using the checklist and questionnaire will help avoid overlooking important information.

We will perform accounting services only as needed to prepare your tax returns. If an amended tax return is required because not all tax information was provided, we can provide this service at an additional fee.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, 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.

Our fee is based on the complexity of your tax return and the time required to prepare it. Invoices are due and payable upon completion of your tax return.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. If you prefer a digital version of your return, download it and save it in a safe place.

Review all tax return documents carefully before signing them. Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us when you submit your tax documents.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (218)390-3942.

Sincerely,

Jill Bowman

JILL BOWMAN, EA
LUMINE TAX SERVICE, LLC

Accepted By:

Taxpayer Date

Spouse Date