



CHRISTINE KRIEGER

Taxes & More

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TAX PLANNING: Engagement Letter & Disclaimer

Thank you for choosing us, D Christine Krieger, EA – Taxes & More for your tax planning needs.

All tax planning, strategies, advice, and recommendations in this plan are based on the taxpayer's available tax return data, information disclosed to us, and current tax law. **Tax laws can and do change frequently.** Federal, state, local, payroll, property, and other taxes often overlap and involve complexities that rarely yield a single best strategy. Effective tax planning is a lifelong process. It requires regular updates to review the taxpayer's goals, life changes, investments, businesses, changes in income, pre-tax opportunities, retirement planning, state, and local taxation, and more.

Our 2024 fee for tax planning is \$275 for the first hour, plus \$210 for every additional hour. The hourly rate is based on time spent on communication with the taxpayer and other entities as well as the time spent for the actual tax planning calculations.

Tax projections and recommendations include assumptions and should not be viewed as guarantees. The actual results will vary from projections. The actual tax savings will vary from the estimated tax savings. These plans and projections are only a guide, not a promise. These plans are generated using current IRS & FTB information and Proconnect Tax software and are provided without warranty of any kind, expressed or implied. While every effort has been made to ensure accuracy, we won't accept responsibility for any errors or omissions, or for any consequences arising from use of the services.

Tax planning is a team exercise. Many of the tax savings estimated in this plan are dependent upon taxpayers completing certain action items. If taxpayers fail to take necessary actions, the tax strategies may not yield the estimated benefit. **Success is also dependent upon regular communication about changes in the taxpayers' circumstances to our firm,** so we can evaluate the impact of changes on the taxpayer's tax plan.

In addition to the taxpayers and our firm, planning often includes financial planners, insurance agents, and attorneys. We do not assume responsibility for the advice of any additional professionals.

Third-party links provided in the report serve as a convenience and for informational purposes only, we accept no responsibility for the accuracy, legality, or content on these sites.

We are under no obligation to update this tax plan.

To affirm that this letter correctly summarizes your understanding of our arrangements, please sign in the space indicated below.

Signature

Date

Spouse's signature (if present)

Date