

Service Agreement

Dear Valued Client,

We are writing to outline the mutual responsibilities associated with the services we are pleased to offer you. This service agreement pertains to your ongoing tax returns and subsequent years, unless either party chooses to terminate the agreement. The primary service covered within this arrangement is the preparation of your individual tax return. Depending on the support tier you choose additional services throughout the year may also be included. This agreement supersedes any previous understandings.

Responsibilities as a Taxpayer

1. **Support Level Confirmation:** Please review and confirm that the selected support level on page 2 aligns with your specific needs and circumstances. You are aware that services not included in your chosen package will incur separate charges.
2. **Information Submission:** You commit to providing all necessary income and deductible expense details. Should you acquire additional information after work has commenced on your return, please promptly inform us to ensure accurate filing.
3. **Accuracy of Information:** You affirm the accuracy of all expenses and deduction amounts, possessing the required supporting written records. Occasionally, we may request you to review your documentation.
4. **Documentation for Audits:** In the event of an audit by the IRS or state tax authority (if applicable), you must be able to furnish written records for all items on your return. We can guide you on acceptable forms of evidence.
5. **Thorough Review:** It is your responsibility to thoroughly review the return for accuracy before signing.
6. **Payment Information:** Payment details need to be provided before we can file your tax return. If the engagement is terminated before completion, a fee for the work done will apply. Late returns or those spanning multiple years necessitate a retainer.
7. **Timely Information Submission:** Should you fail to provide all required information for us to complete an accurate return by March 15, you authorize us to file a 6-month extension on your behalf. Please note that while the extension grants more time for filing, it does not extend the deadline for tax payments, potentially leading to penalties. We recommend submitting your tax information by March 15 to enable timely filing. Unless you instruct otherwise in writing, we may, at our discretion, file an extension for the subsequent year.

Client Initial: _____

Responsibilities of Epic Trust and Scope of Work

For all prepared Income Tax Returns, including Essential Tier Tax Support:

1. **Preparation of Returns:** We will prepare your federal and, where relevant, state tax returns based on the information provided. Please note that our services do not encompass auditing or verification of your data.
2. **Standard of Care:** Our commitment is to perform with the same care and diligence as a prudent industry professional. We will adhere to your written or verbal instructions.
3. **Audited Returns:** If your return undergoes an audit, you are responsible for verifying the reported items.
4. **Exclusions:** This agreement excludes bookkeeping, financial planning, insurance products, business licensing, LLC renewals, or Department of Revenue reports.
5. **Insurance Review:** An authorized insurance professional from our team will invite you to review your risk exposure and insurance coverage during the year, ensuring competitive pricing and adequate protection.
6. **Online Access:** Our online vault offers you 24/7 access to your tax returns and essential support documents.
7. **Estimated Tax Vouchers:** If advised, we will provide estimated tax payment vouchers.
8. **Review Session:** We offer the opportunity to discuss your tax return over the phone or via Zoom, addressing queries and offering insights.

Support Package Pricing

Premium (Tax Management) \$ /month	Full Support (Tax Planning) \$ /month	Essentials (Tax Compliance) \$ /month
<u>Brief overview:</u> Includes quarterly meetings to review execution of tax planning ideas and concepts, in addition to tax preparation, the planning/strategy session and monthly workshops.	<u>Brief overview:</u> Includes a fall planning/strategy session in addition to preparation and monthly workshops.	<u>Brief overview:</u> Includes tax return preparation and invitations to our monthly workshops*
One Time Startup/Backwork Cost \$ _____ withdrawn on _____		

If applicable, other returns included in this agreement: _____

Payments are processed on the 5th of each month. Monthly payments should continue through December to be eligible for tax preparation. Since services are provided year-round, discontinuing payments mid-year does not result in refunds. Any discrepancy between the monthly billing collected and the actual preparation fee will be billed and collected at the time of filing. Prices are reviewed annually due to potential complex variations. Increases exceeding 10% will initiate a written notification. Fees are reconciled at the time of filing returns.

For clients of Epic Trust Investment Advisors, pre-scheduled one-on-one meetings may cover relevant workshop content in a personalized manner.

Payment Authorization

I authorize Epic Tax Solutions LLC, a subsidiary of Epic Trust Financial Group, LLC, to initiate an EFT or credit card charge as required. I acknowledge that any erroneous or incomplete information provided by me, or my financial institution is not the responsibility of Epic Tax Solutions LLC or Epic Trust Financial Group, LLC.

Please complete the following:

Epic Trust Financial Group LLC may use the payment information provided below for this agreement:

Payment information			
Service Package: (Please circle)	Premium	Full Support	Essentials
Payment Method:	<input type="checkbox"/> Checking	<input type="checkbox"/> Card	Zip Code: _____ Phone Number: _____
Card Number:	_____ Exp: _____ / _____		CVC: _____
Account Number:	_____ Routing Number: _____		

Signature

I have read and understand this agreement. If filing jointly, I represent my significant other in this agreement.

Printed Name Signature Date