



September 1, 2023

RE: Introduction of Monthly Fee Structure

Dear Clients,

As we enhance our service offerings and continue to provide you with the valuable professional support you know and love, we are transitioning to monthly billing. We believe this change will make it easier for you to budget and offer you greater convenience and flexibility as you utilize our range of financial services to support your family's developing needs.

**Beginning September 2023**, we are shifting to a **monthly billing structure**. Instead of charging on a per-form basis, we will start offering a fixed monthly fee for our tax preparation services. **To get started, review the service agreement included with this letter and return the completed form to our office.** While you are in, you'll receive a gift from us as a thank you for helping us with the transition (as supplies last).

Your monthly fee will cover all tax-related services we offer, including tax preparation, filing, compliance, and consultation. The service that you currently utilize within our office will now be called **Essentials Tax Support** and will now include monthly workshops and enhanced individual client support.

**We will continue to offer customized pricing based on your unique needs.** Your monthly investment in our services is based on the complexity of your tax situation. We evaluate your specific needs to provide a fair and tailored pricing plan. We are committed to offering personalized, consistent, and quality work.

We understand that any changes, especially when it comes to billing, can raise questions. Our team is ready to connect to review how these changes impact you. You can reach us by phone or email. We are here to help.

We are here to support your family's financial goals, tailoring a service experience that does just that. If you feel that the service package you are receiving is not matching your needs, let's get together and design one that will.

Warm regards,

Epic Trust Tax Team

Nathan Burt, Ron Burt, Charlie Burt, Mark Haynes, Mette Warnick, Erica Davis, Eliza Cole, Ethan Later, Cheryl Stenberg, Ella Billman, and Julia Robinson

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