

Eagle Tax and Bookkeeping

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CONFIDENTIALITY PRIVILEGE ENGAGEMENT LETTER -Tax Year 2025

Dear Client:

The Internal Revenue Code, as amended by the Internal Revenue Service Restructuring and Reform Act of 1998, extends a CPA–client confidentiality privilege to qualified tax advice that we provide to you. In order to ensure that all communications resulting from tax advice is covered under the privilege umbrella of the Act, we are asking you to confirm the following arrangements:

We are your tax preparer **only (not your CPA)**. We will provide tax advice as needed or requested to meet specific objectives or generally to meet long-term tax related goals and objectives. You have the right to review and/or be supplied with copies of any and all tax planning or research memos and work-papers prepared by our firm related to such tax advice. Tax advice includes, but is not limited to, the following:

Researching the income tax reporting of a particular transaction. We will review these situations with you and resolve issues in your favor whenever possible. Providing business tax and consulting to you, throughout 2026, for consideration in making tax-related decisions. Providing services related to the expected outcome of future tax decisions.

Privileged tax advice does not include communications associated with the preparation of tax returns, tax accrual work papers associated with a financial audit or other financial statement engagement, or in providing general business or accounting recommendations or other non-tax engagements.

You may assert the confidentiality privilege in any non-criminal tax matter before the Internal Revenue Service or any proceeding in Federal Court brought by or against the United States

We will not disclose any advice provided under the scope of this engagement letter to the Internal Revenue Service or third parties unless you provide us written consent to do so. Any disclosure of confidential information by you or us to the IRS or third parties may cause the Confidentiality Privilege to be waived. Caution must be taken by both parties to not inadvertently waive the privilege.

You should notify us of any requests by the Internal Revenue Service for information about any tax advice or tax advice documents provided by us to you.

If you advise us to assert the Confidentiality Privilege on your behalf you agree to hold ****EAGLE TAX & BOOKKEEPING**** harmless and indemnify us for any attorney fees and any other costs and expenses (including penalties) incurred by us in defending the confidential communication.

Very truly yours,

Accepted Signature: _____

Taxpayer Name: _____

Date: _____

Date: _____