

Tax Year 2025 Tax Preparation Agreement

Agreed to by - *both spouses must sign for preparation of joint returns*

Taxpayer 1 Name	Taxpayer 2 Name		
Taxpayer 1 Signature	Date	Taxpayer 2 Signature	Date

Thank you for choosing Rowekamp Tax Service LLC to assist you with your tax returns. This agreement confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide. **By signing above**, you acknowledge the following arrangements and confirm your responsibilities in the preparation of your tax returns.

We will prepare your federal and state income tax returns for tax year 2025 provided that you abide by the terms and conditions set forth in this agreement. You agree to provide us with complete and accurate income and deductible expense information. We have provided the following worksheets to assist you in gathering the required information to complete your return. We ask that you review and complete these worksheets in order to provide all relevant information. If you receive additional information after we begin working on your tax returns, you will contact us immediately.

In some cases, we will ask to review your documentation, and may ask you to clarify some items, but will not audit or otherwise verify the data you submit. You must be able to provide written records of all items included on your returns. If audited by either the IRS or state tax authority, we can provide guidance concerning what evidence is acceptable, and you will be responsible for verifying the items reported. We will inform you of any material errors, fraud, or other illegal acts we discover. 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 to the extent permitted under federal and state law. If a tax authority should later contest this issue, there may be an assessment of additional tax, interest, and/or penalty. Rowekamp Tax Service LLC assumes no liability of any such assessment. Rowekamp Tax Service LLC will not pay tax you owe.

Our fee is based on the federal and state forms required to complete your income tax returns. The forms needed to complete your tax returns may vary year to year depending on the complexity of your tax returns. Tax return preparation fees are due and payable annually upon completion of this engagement. Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities. Those services may require an additional fee. If you terminate this engagement before completion, you agree to pay a fee for work completed. There are additional fees for other services such as tax planning, preparation of any MN Homestead Credit refunds, and preparation of amended current or prior year federal and state tax returns.

We will return your documents to you at the end of this engagement. You will store these documents, along with all supporting information, with your tax returns in a secure location for seven years. We retain copies of your tax returns and our work papers from your engagement for up to five years, after which time these documents will be destroyed. We reserve the right to retain records for a longer period if required by statute, rule, regulation, or legal order.

You must review the tax returns carefully before signing to make sure the information is correct. We will e-file all of your tax returns upon receipt of signed Form 8879, unless otherwise noted. If you do not want us to e-file your tax returns, you will be solely responsible to file the tax returns with the appropriate taxing authorities. Our engagement to prepare your annual tax returns will conclude with the submittal and acceptance of e-filed tax returns, or if not e-filing, delivery of completed tax returns to you.

You will let us know promptly if you decide to terminate this engagement for any reason. However, nothing in this agreement will guarantee future services, and the parties may terminate this engagement at any time for any reason.

This engagement requires Rowekamp Tax Service LLC to collect nonpublic personally identifiable information (PII) about you. We do not disclose any nonpublic PII about our clients or former clients to anyone, except as requested by our clients or as required by law. We restrict access to nonpublic PII concerning you, except to our employees who need such information in order to provide services to you. We rely on software, applications, and other financial institutions in order to complete your tax returns. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic PII. In the event of any material disclosure of your nonpublic PII, we will provide you with prompt notice in compliance with state and federal statutes, rules, and regulations.

To confirm that this agreement correctly summarizes your understanding of the arrangements for this engagement, **sign above** in the space indicated and return this agreement to us with all tax documents.

Eric Rowekamp
Rowekamp Tax Service LLC