

# Burr Business Service (BBS) Client Engagement Document – Tax Year 2025

**Client Name:** \_\_\_\_\_

**Engagement:** I have engaged Burr Business Service (BBS) to prepare my Individual Federal (Form 1040) and State of Nebraska (Form 1040N) income tax returns for the tax year 2025. I acknowledge that I am responsible for the accuracy and completeness of the information provided to BBS. I will retain all records necessary to substantiate income, deductions, credits, and other items reported on my returns for seven (7) years, and I will provide BBS with all forms, W-2s, 1099s, written summaries, logbooks, and receipts necessary for preparation. BBS does not retain original source documents; all originals are returned to the client. Documentation for charitable contributions is the sole responsibility of the client.

BBS will prepare only Nebraska state income tax returns unless otherwise specifically engaged in writing to prepare returns for another jurisdiction. In accordance with IRS Circular 230, BBS will rely on information furnished by the client without verification; however, BBS may request additional information or clarification if the information appears incomplete, inconsistent, or incorrect. If questions arise concerning the interpretation of applicable tax law, BBS will apply professional judgment in resolving such matters.

I understand and acknowledge that if an error resulting from inaccurate, incomplete, or untimely information provided by me is identified during an examination or audit, I am solely responsible for any additional tax, penalties, and interest assessed. If BBS is requested to assist or represent me in connection with a tax audit, examination, correspondence, or notice from the IRS or a state taxing authority, such services constitute a separate engagement and will be subject to additional fees. In the event of a preparer error, I acknowledge that I remain responsible for any additional tax due.

**Income Acknowledgment:** I acknowledge that I have reported, to the best of my knowledge and belief, all income received in 2025, including barter, digital assets, consumer-to-consumer activity, cash-based revenues, sales, staking, mining, lending, NFT activity, trades, and all other income, whether received in-person, in-kind, or electronically.

**Fees and Payment:** I understand that BBS fees are due and payable upon completion of these returns. Additional services will be billed and are payable when completed unless a retainer is requested. I acknowledge that BBS will not continue work in the event of my failure to pay timely for services rendered and will not be liable for any costs resulting from the cessation of services. BBS will conclude its engagement upon delivery of the completed returns or upon suspension of services or resignation from the engagement.

**Extensions:** If all information is not provided by April 1, 2026, I will contact BBS to file an extension on my/our behalf. All refundable tax credits will require answering additional questions to comply with due diligence.

**Social Security & Tax Impact:** I acknowledge the impact of reduced taxable income on Social Security benefits and accept responsibility for potential reductions in current and future benefits.

**Confidentiality:** BBS will not supply any information to third parties without written consent.

**Client Communication:** I will contact BBS immediately if I discover additional information that may change my return or if I receive correspondence from the IRS or state taxing authorities.

**Foreign Accounts & Compliance:** I understand that I am responsible for compliance with foreign account reporting requirements. BBS will not file FinCEN Form 114 or the 2024 Corporate Transparency Act forms. I acknowledge that I have been advised that there are substantial penalties for failure to disclose these items.

**Tax Advice & Authorization:** I understand BBS provides formal tax advice in writing only and will not file 990-T forms for K-1s inside IRAs. I authorize BBS to discuss my federal and state returns with the IRS and State of Nebraska. By signing Form 8879, I confirm that I have reviewed and accepted my completed tax return.

**SMS Communications:**  By checking this box, I agree to receive SMS text messages from BBS at the phone number provided. Messages may include appointment reminders, account updates, document requests, and other service-related communications. Message and data rates may apply. Reply STOP to opt-out at any time. Reply HELP for assistance, call 402-477-3822, or email [generalbbs@burrbusiness.com](mailto:generalbbs@burrbusiness.com). No mobile SMS opt-in data will be shared with third parties.

**Acknowledgment:** By signing below, I acknowledge that I have read, understand, and agree to the terms described above.

*\*All BBS policies can be found on [www.burrbusiness.com](http://www.burrbusiness.com)*

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Signature

Date