

Please return this completed form with your 2025 tax information. Please note, NO return can be prepared prior to receiving this form.

<b>Full Name(s)</b>	
<b>Best Contact Number(s)</b>	
<b>E-Mail Address</b>	
<b>Spouse/Partner E-Mail Address</b>	

**Documents to return with this form Check List:**

1. \_\_\_\_ Copy of your driver's license (front and back) if updated or renewed in 2025
2. \_\_\_\_ Copy of voided check for direct deposit refunds and electronic withdrawal if updated in 2025  
NEW 2025 – IRS is phasing out paper checks for refunds.
3. \_\_\_\_ For any new dependents – copy of Birth Certificate(s) and Social Security Card(s)
4. Do you prefer a digital copy \_\_\_\_\_ or a paper copy \_\_\_\_\_ of your 2025 returns?
  - a. There is a \$50 fee for additional copies.
  - b. If you choose a digital copy, please retrieve the file within 10 days and print or save a copy.
5. **Completed client questionnaire. (The questionnaire is included in this packet.)**

This letter confirms that you have engaged Ulster Financial Group, Inc., to prepare your federal and state individual tax return for tax year 2025. Ethical standards require us to determine that all the information you provide supports the type of return you are requesting we file. If we are unable to make that determination, we may not be able to proceed.

The preparation of any additional tax returns brought in with your personal income tax returns, including but not limited to trust, gift tax, business, **must** be brought to the preparer's attention **prior** to dropping. Not disclosing the need for the additional returns may result in penalties or interest being client's responsibility, not Ulster Financial Group, Inc.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. The preparer is not responsible for errors due to incomplete information provided. We do not audit documents provided. Clients are liable for penalties and interest due to but not limited to non-disclosure, receipt of incorrect information, receipt of late information (after due date or requested date), failure to pay proper tax payments (both withholding and estimated payments), for both federal and state.

As a reminder, you are required to retain all documents, canceled checks and other documents that support the basis of income and deductions.

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For Tax Service Engagement Letters returned to Ulster Financial Group Inc. between March 27, 2026, and April 15, 2026, the client must also complete and return the client extension request form if the client is requesting the Ulster Financial Group, Inc file an extension on behalf of the client. Extension requests must be approved by IRS and states. Client remains responsible for any payments, penalties or interest assessed.

**No** extension is automatically filed. Client must return an engagement letter and extension request form.

Tax Service Engagement Letters received after April 15, 2026, CLIENT is\was responsible for the filing of an extension request and payment of any payments, penalties or interest assessed.

Ulster Financial Group Inc. does not represent or warrant specific date of completion of the return.

All extensions will be prepared after June 19, 2026.

Payment for services is required prior to filing returns.

Taxpayer Signature:

Date:

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Spouse/Partner Signature:

Date:

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