

# GRAFF

CPAs and Business Advisors

As we begin 2024, we'd like to express our gratitude once again for choosing us as the experts you trust for your tax and accounting needs. The trust and confidence you place in us is vital to our success as an organization and fuels our commitment to serving you with the high-level, timely service you've come to expect. Thank you.

In acknowledgment of the start of tax season, we want to assure you that we will work diligently to meet your tax compliance obligations and see to it that you pay no more tax than is required by law.

Rates for 2023 Tax Preparation: Our firm bill rate will be \$375/hr.

Bayerkohler & Graff, Ltd. is now Graff, Ltd. We're proud to be serving you this tax season under this new identity. Thank you for your continued support through this transition.

Please sign the back of this letter and return it with 2023 tax documents. A 24-hour drop-box is available at our Minnetonka office for your convenience. We also continue to offer access to our secure client portal through Office Tools at [grafltd.com](http://grafltd.com).

## **The Graff, Ltd. Team**

Bobbi Snow

Johnathan Huspek

Blake Thompson

Justin Soles

Carson Passer

Louis Lachner

Christina New

Samantha Kuck

David Alden

Sarah Graff

David Graff

Shirley Ward

Derek Folk

Young Woo

Dustin Sartori

We look forward to serving you. As always, please call us with any questions you may have as you gather your tax documents for the 2023 tax year. If you would like a customized tax organizer, please email us at ([info@grafltd.com](mailto:info@grafltd.com)) or call 763-427-2542.

Sincerely,

Graff, Ltd. | CPAs and Business Advisors

**\*\*\*PLEASE SIGN THE BACK OF THIS LETTER AND RETURN IT WITH YOUR 2023 TAX DOCUMENTS\*\*\***

10159 Wayzata Boulevard, Suite 100 Minnetonka, MN 55305  
763.427.2542 tel | [info@grafltd.com](mailto:info@grafltd.com)

# GRAFF

CPAs and Business Advisors

## **ENGAGEMENT LETTER FOR 2023 TAX PREPARATION**

**\*\*\*PLEASE SIGN THIS LETTER AND RETURN IT WITH YOUR 2023 TAX DOCUMENTS\*\*\***

This letter confirms the arrangements for our services concerning the preparation of your income tax returns. We will prepare your 2023 federal and state Income Tax Returns from the information you furnish us. We will not audit or otherwise verify the data you submit; you are solely responsible for the information reported on the returns, and any errors or unsubstantiated claims that may result in changes, penalties, interest, or adjustments.

Please remember you have the final responsibility for your tax returns and should therefore review them carefully before you sign them. In the event of a governmental audit, we will be available to represent you, and will render additional invoices for the time and expenses involved, unless you opt into our Audit Assistance Program. If you have any questions about these issues, please contact us.

Fees for the preparation of your income tax returns will be based upon our standard hourly billing rates. All invoices are due and payable upon presentation. Please note the fees for your tax returns do not include services rendered in connection with an audit, telephone consultation, or in-person consulting throughout the year.

### **\*ATTENTION ALL BUSINESS OWNERS-New for 2024\***

**Starting in 2024, there is an additional reporting requirement with the federal government as part of the Federal Corporate Transparency Act:**

**Corporate Transparency Act/Beneficial Ownership Reporting**

***Assisting you with your compliance with the Corporate Transparency Act ("CTA"), including beneficial ownership information ("BOI") reporting, is NOT within the scope of this engagement. You have sole responsibility for your compliance with the CTA, including its BOI reporting requirements and the collection of relevant ownership information. We shall have no liability resulting from your failure to comply with CTA.***

***Information regarding the BOI reporting requirements can be found at <https://www.fincen.gov/boi>. Consider consulting with legal counsel if you have questions regarding the applicability of the CTA's reporting requirements and issues surrounding the collection of relevant ownership information.***

Sincerely,

Graff, Ltd. | CPAs and Business Advisors

\_\_\_\_\_  
Your Signature(s) and Date

1. Audit Assistance – Please add audit assistance to my invoice \_\_\_\_Yes \_\_\_\_No
2. Foreign Account Reporting – Please indicate if you had a foreign financial account \_\_\_\_Yes \_\_\_\_No
3. Virtual Currency Reporting – Please indicate if you have traded in Virtual Currency \_\_\_\_Yes \_\_\_\_No

\*Audit Assistance is offered at the following rates per return for 2023 Tax Year – \$75 Individual & \$150 Business\*