



LARK & LEDGER

Engagement Agreement – Big Beautiful Briefing

Effective for 2025 Project Year

We appreciate the opportunity to support you with your One Big Beautiful Bill Act (OBBBA) planning. Please review the terms of this one-time engagement herein and in the attached Standard Terms & Conditions.

1. Parties

This agreement (the “Engagement Agreement”) is between **Lark & Ledger, PLLC** (the “Firm,” “we,” or “us”) and **the undersigned client** (“you” or the “Client”).

2. Engagement & Scope of Services

This is a one-time advisory engagement for a project called the **Big Beautiful Briefing**, designed to help you understand how the One Big Beautiful Bill Act (OB3) may affect your current or future tax situation.

As part of this engagement, we will:

- Review your most recent tax return(s)
- Apply relevant provisions from the OBBBA
- Model relevant tax impact scenario(s)
- Deliver a summary PDF report outlining findings and recommendations

This is a limited-scope engagement. It does **not** include tax preparation, filings of any tax documents, or advising beyond modeling the impacts of the OB3 on your known tax situation to the extent IRS guidance is currently available. Additional services may be available upon request under a separate engagement.

3. Term

This engagement begins upon acceptance and concludes upon delivery of the Big Beautiful Briefing.

4. Fees & Payment Terms

The fee for this engagement is \$500, due in full upon acceptance of this agreement.

5. Termination & Refunds

Either party may terminate immediately with written notice.

If you are not satisfied with your Big Beautiful Briefing, we will offer a full refund on request within 14 days of delivery—no questions asked.

6. Client Responsibilities

You are responsible for providing accurate and timely information relevant to the engagement.

7. Deliverables & Timing

We will deliver a written report (“the Big Beautiful Briefing”) in PDF format within 7 calendar days of receiving both (1) full payment and (2) all requested information.

8. Acceptance

By accepting the Proposal and submitting payment, you acknowledge that you have read, understand, and agree to the terms of this Engagement Agreement and our Standard Terms & Conditions.