



## Center for Tax Planning, LLC - Letter of Engagement

### Purpose:

This engagement letter outlines the agreement for tax preparation, financial advice, and data-sharing services between the client, Center for Tax Planning, LLC, MIP Advisors, LLC, and TaxFyle.

### Authorization to Release Information:

By signing this agreement, you authorize the sharing of the following information:

- Current-year and prior-years' tax returns, including all associated records
- Copies of financial data and other documentation provided for tax preparation
- Data created within 24 months of signing this agreement

### Data Will Be Shared With:

- Center for Tax Planning, LLC: Management, staff, and contracted personnel
- MIP Advisors, LLC: Management, staff, and your Financial Advisor (Terence Reed Melissa Southwell, and/or Ryan Cohen)
- TaxFyle: The third-party tax preparation service for filing your return

### Duration of Authorization:

This agreement remains valid for 24 months from the signing date.

### Important Notes:

- Your consent is required under federal law for sharing tax information beyond preparation and filing.
- This consent can be revoked in writing at any time.

### Acknowledgment and Agreement:

By signing below, you acknowledge and accept the terms outlined in this engagement letter.

### Client Information and Authorization:

Full Name (Print):	Signature:
SSN/TIN:	Date:
Full Name (Print):	Signature:
SSN/TIN:	Date: