



January 1, 20XX

Singleton Wealth
5230 Washington Street, Ste. 201
West Roxbury, MA 02132

RE: Stock Option Transaction Consultation

Engagement Dear Mr. John Smith:

This letter is to confirm and specify the terms of the engagement with you and to clarify the nature and extent of the services I will provide.

I will conduct an analysis of stock option transactions based on information which you will furnish to me. It is your responsibility to provide all the information required for the proper analysis of the transaction. Upon completion of the analysis, we will schedule a time to discuss the transaction and the final recommendation.

Any report required to be submitted to the IRS will be prepared and made available to you via your established client portal along with instructions. Please make sure to review the instructions and let me know if you have any questions so that I can address your questions forthwith.

You should retain all the documents related to the transaction in a file for a minimum of seven years or longer, if deemed necessary, beyond the sale of the stock at a future date.

Please note that the analysis is conducted within the context of today's Tax Code and within the constraints of market expectations based on currently available information. As such, market fluctuations, over time, may affect the outcomes as determined in this analysis which could result in a gain or loss of a tax beneficial position; this is an innate risk of taking a specific position on a stock option transaction. Further information regarding this issue will be provided to you in the final report.

Please sign the engagement letter below. Thank you for your attention to this matter, and please contact me with any questions that you may have regarding this letter or the service to be provided.

Best wishes,

Sylvia Singleton, MSA, MST, CPA

ACCEPTED AND AGREED:

Client (Print Name)

Client (Signature)

Date