



**Justin R. Poore, MBA, EA**  
**Financial Planner\* & Tax Accountant**  
CA Insurance Lic#: 0D77291

MAILING ONLY: 29564 Yosemite Springs Pkwy #82  
Coarsegold, CA 93614

Welcome to the New Year, 2026 ... filing Tax Year 2025!

This new year comes with many challenges for taxes to prepare for. We have compiled a few forms that would be helpful for you in gathering your tax documents in preparation for this years filing including an updated price list refined for greater clarity of estimated costs. **BE SURE TO SEE THE BBB TAX CHANGES THAT MAY APPLY TO YOU!!!** (big beautiful bill)

Currently, the deadlines for 2025 are to remain “usually scheduled”, please reference the standard deadline page attached, as well as reference Publication 509 for other specific required dates.

Continuing this year is the request to on board client data through a new “Wealth Vision” (same thing as E-Money just different name). Clients will be glad to access all tax data for previous years, as well as upload securely all tax documentation in an encrypted and secure vault eliminating the need for emailing. This is no charge to all JP Advising clients – and reset password requests will be handled expediently. All clients under E-Money must now re-register with Wealth Vision.

Power of Attorney’s (POA) are now a requirement for tax preparers to speak on your behalf with any taxing authority. JP Advising and Justin Poore may already retain a POA for tax services for your account, however, it is possible that an updated copy will be required. Each taxing authority has their own versions, please be patient with this process as it is a requirement for us to handle your accounts with authorities per your request.

Finally, it is extremely advisable that you create an online account with the IRS and the state in which you reside. There you will be able to get transcripts, previous filings, and other tax related data that may be important to your filing of returns. It may be a requirement to access an online account to receive information as it will be much more expedient than a phone call.

Thank you for your continued support, and look forward to a successful tax filing season with you.

Sincerely,

Justin Poore

**Office: 559.244.9364**

**Fax: 559.891.0986**

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**RE: Updates to Engagement Letter – 2025**

Below are some updates to the signed engagement letter we retain on file for your acceptance to our service.

JP Advising is increasing tax service costs by 10% - \*All applicable discounts still apply

JP Advising – Justin Poore – does NOT offer Medi-Care Supplements or Advantage plans – Assistance with choice or direction or special assistance is billed at \$200 per hour

JP Advising – Justin Poore – does not offer or sell individual or corporate healthcare plans to any new clients – any new clients requesting assistance will be required to ADD Justin Poore as a Delegate on their plans – potential per hour charge for services billed at \$50 per hour

JP Advising – Justin Poore – is no longer servicing Tax Year 2023 nor any year previous unless for specialized service requests at charge

Refund status for all returns filed are available online within two to three days from filing, please reference the applicable website to determine your refund status, JP Advising and Justin Poore do NOT know when the governments will send you the refunds

The minimum charge for any filed return is \$100 for information returns; \$200 minimum for all other returns other than information, child, or special circumstance – price list available upon request

Amended per return costs for existing clients \$150; \$200 for any new client requiring amendments

In Person tax consultations in town other than tax reviews for current year processing will incur a \$20 travel cost, applied also to any financial planning meeting per occurrence after initial meeting. Rescheduled appointments may incur this travel fee when appointments not met in town.

Expedited services are available for additional hourly charges or fee's depending on circumstance

Filing Tax Extensions for Personal Returns incurs a cost of \$100; Corporate Extension \$150

LATE PAYMENT FEE'S WILL BE CHARGED AT \$25 PER MONTH \*Not to exceed 6 months

DISCOUNT / INCENTIVE : Payments made to JP Advising by bank drafts versus credit cards will not be charged a 3% convenience fee. Zelle : 559-244-9364

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Justin Poore – Tax Accountant  
Engagement Letter

**Please Sign and Remit with Tax Planner**

I appreciate the opportunity to work with you. To minimize the possibility of a misunderstanding between us, this sets forth pertinent information about the services I provide and will perform for you.

As in the previous tax year, all tax returns will be filed electronically as required by California Law, as well as Federal Law beginning for tax years 2009 and beyond, unless, of course, unusual circumstances exist.

I will prepare your required Federal and applicable State tax return from the information you furnish me. I will not audit or otherwise verify the data you submit, although I may ask you to clarify some information. I will furnish you a questionnaire to help you gather and organize the necessary information in order to help keep your preparation cost to a minimum. Upon completion of your return and receipt of payment, a copy of your full return will be provided to you and available to you upon request.

As a standard rule, it is your responsibility to maintain, in your records, the documentation necessary to support the data used in preparing your tax return, including but limited to – auto, travel, entertainment, and related required expense records. You may ask me for advice with regard to those items. It is also your responsibility to carefully examine and approve your completed tax return prior to me filing your tax return electronically. I am not responsible for the disallowance of doubtful deductions or inadequately supported documentation provided by you, nor for resulting taxes, penalties and interest.

It is a standard of my practice that the box available on your tax return be checked when asked if it is alright for the IRS to contact me with regards to your return. If you do not wish to have me communicate with the IRS regarding your return, please let me know in writing. Please note that I will not receive separate copies of IRS notices, therefore, you must provide me with copies of notices regarding either federal or state information. Once elected to speak to authorities regarding your return, it is valid for one year after the due date for the filing return, and may not be revoked. A Power of Attorney form may be requested or required for various tax authorities to work with certain information.

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Fee for services only encompasses the preparation through completion of your federal and applicable state tax returns. It does not include responding to inquiries or examination by taxing authorities. However, I may be available to represent you for this purpose for the stated applicable hourly rate included in this engagement letter. Please also reference most recent price sheet available. General questions related to refund status, tax exemptions, and other minor tax requests will be unbilled and considered part of your fee for preparation and completion. Any tax related item requiring more than one hour work will be billed hourly. Additional travel costs may be applicable to some clients.

Per my ethical standards, as well as federal and state law, I am unable to provide your confidential tax information to third parties without written consent by you. This may include real estate and loan lending institutions, a friend, family member, or business. Only when it is required by law will I furnish your confidential information.

It is component of my practice to retain electronic copies of the information you provide me to complete your return as well as your federal and applicable state tax returns for a minimum of seven years. These documents will be stored electronically and may be backed up and stored at another location in case of fire. I am not responsible for random acts of god, theft, or loss of information that is deemed out of my control.

If any dispute arises among the parties, they agree first, in good faith, to settle the dispute by mediation administered by the American Arbitration Association (AAA) under its Rules for Professional Accounting and Related Services Disputes. All unresolved disputes shall then be decided by final and binding arbitration in accordance with the Rules for Professional Accounting and Related Services Disputes of the AAA. Fees charged by any mediators, arbitrators, or the AAA shall be shared equally between both parties. IN AGREEING TO ARBITRATION, WE BOTH ACKNOWLEDGE THAT IN THE EVENT OF A DISPUTE OVER FEES CHARGED BY THE ACCOUNTANT, EACH OF US IS GIVING UP THE RIGHT TO HAVE THE DISPUTE DECIDED IN A COURT OF LAW BEFORE A JUDGE OR JURY AND INSTEAD ARE ACCEPTING THE USE OF ARBITRATION FOR RESOLUTION.

To ensure the timely processing of your return, please remit all information required to complete your return by April 1<sup>st</sup>. As a standard rule, federal and state tax returns must be filed by April 15<sup>th</sup> of each year. If the return may not be completed, an extension may be filed only if requested in writing, as you may be subject to late filing fees or extension penalties. As a reminder, incomplete tax returns filed for extension still must pay the tax due by April 15<sup>th</sup> regardless of status of completion of the return. Please reference price sheet for additional details.

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Currently, the hourly rate charged for the acceptance of this engagement is Two Hundred Dollars per hour. This encompasses the review of documents, technology costs, printing and postage, and my successful completion of return. Charges may still exist upon completion of returns if questions or related information needs to be provided at a later date, at which the hourly rate may still be incurred. Payment for services is due when rendered, and interim billings may be submitted as work progresses and expenses are incurred. I reserve the right to stop work on any account that is 30 days past due, in accordance with my collection policies. All information will be returned to you, and you will be responsible for any fee's or penalties that may be incurred as a result of incomplete work. There will be an additional charge of \$25 for any check payment that results in an insufficient charge. Please reference price sheet for additional details. Failure to make payment after 90 days will incur a monthly late penalty. Failure to make payment after 180 days may result in adverse tax reporting and credit collections. After 365 days of non payment, and without any other payment agreement, JP Advising will file a Cancellation of Debt notice with the Internal Revenue Service and applicable States. The cancellation of debt notice and service is a non cancellable motion, and places the burden of your debt with responsibility to the Internal Revenue Service and applicable State(s).

Signing of this engagement letter gives consent for JP Advising to use my/our tax information, for offering the following services, including but not limited to: financial planning, retirement planning, long-term care and life insurance, estate and gift tax planning, business consulting, individual and business tax planning, and bookkeeping services. I/We also consent to the use of my/our tax information for purposes of communicating with me/us via newsletter, email, website, phone or other means of communicating with information or data that may be of use to me/us, and at my/our request, for the purpose of making recommendations to me/us, for any of the purposes listed above. I acknowledge that I may request a more limited disclosure of Tax Return Information. I/We understand that Justin Poore EA, (JP Advising), is not a registered broker-dealer or a registered investment adviser. I/We understand that Justin Poore EA, (JP Advising), is affiliated with LPL Financial, as an independent contractor solely for offering financial products and services. LPL Financial does not offer, provide or supervise tax advice or tax preparation services, and any services provided by LPL Financial will be pursuant to a written agreement directly with the relevant LPL Financial entity.

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## General Tax Deadlines Tax Year - 2025

	<b>Expected Deadline</b>	<b>Deadline for Filing</b>	<b>Extension Deadline</b>
<b>Individual</b>	April 1 <sup>st</sup> (Additional charges will apply after this day)	April 15th	October 15th
<b>Corporation – S-Corp; LLC; Partnership</b>	March 10 <sup>th</sup>	March 17th	September 15th

IMPORTANT NOTE !!!  
FILING AN EXTENSION IS NOT AN EXTENSION TO PAY YOUR TAXES –  
IT IS ONLY AN EXTENSION TO FILE.  
YOU MUST STILL PAY YOUR TAXES ON TIME TO ELIMINATE PENALTIES AND INTEREST!!!

**EXPECTED E-FILING WINDOW OPENS ON : JANUARY 27<sup>th</sup> 2026**

**Please ALSO reference:**

**Publication 509**

Type in search bar at [www.irs.gov](http://www.irs.gov)

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# What would you like us to do with your tax Originals?

Please shred my documents after tax season.  
An electronic copy will be kept on file.

Please send my documents back to me for an  
additional fee of \$50

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Client Name

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Signature

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## Typical Tax Items Mailed

Number of Documents Sent	Document Type	Document Description
	W-2	Wages from Employment
	1099-A	Acquisition or Abandonment of Secured Property
	1099-B	Sales, Barters, and Redemption of Securities
	1099-C	Cancellation of Debt
	1099-DIV	Dividends, Capital Gains, and Distributions
	1099-G	Gvt. Payment: Tax Refund and Unemployment
	1099-H	Health Coverage Tax Credit
	1099-INT	Interest Income
	1099-MISC	Non-Employment Compensation
	1099-NEC	SELF EMPLOYMENT INCOME
	1099-K	SELF EMPLOYMENT / CREDIT CARD MERCHANT RECEIPT
	1099-R	Retirement Plan and Pension Distributions
	SSA-1099	Social Security Payments
	1098-E	Student Loan Interest
	1098-T	Tuition, Reimbursements, Scholarships, Grants
	1098-M	Mortgage Interest Statement
	1095-A	Health Insurance Marketplace Statement
	1095-C	Affordable Care Act Reporting
	W – 2G	Winnings from Gambling – Hand Pay Records

Please be sure to send any and all mailed documents that look important to your tax filing. The above is just a small list of typical items many individuals receive in the mail for their tax filing.

Please list any other documents sent to us that are important to your filing:

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Financial Planner\* & Enrolled Agent  
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~ Call for Appointments ~

MAILING ADDRESS  
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## 2025 Tax Changes Checklist

Yes      NO      Did you buy a new vehicle in 2025 ?

Yes      NO      Did you pay interest on a vehicle loan in 2025 ?

State Amount paid :

Yes      NO      Did you buy any Solar or other Energy Savings item ?

State What Bought:

State Amount Paid:

Yes      NO      Did you work OVERTIME in 2025 ?  
If not reported on W-2; please provide Paystubs!

Yes      NO      I run a business and have employee's – which myself counts

Yes      NO      Is this business held in California?

\*\*\* If your business is in California, and you do NOT have a Retirement account : IRA, ROTH IRA, 401k, 403b : In YOUR NAME : Then you MUST register with Cal-Savers or speak with me about a personal retirement plan \*\*\*

Yes      NO      I need help with Financial Planning / Retirement

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# Tax Check list and Input

## Personal Information:

Did anything change over the course of the year – i.e. address change, married, child, job change, death?

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Name: \_\_\_\_\_

Name: \_\_\_\_\_

SS#: \_\_\_\_\_

SS#: \_\_\_\_\_

DOB: \_\_\_\_\_

DOB: \_\_\_\_\_

Gender: \_\_\_\_\_

Gender: \_\_\_\_\_

Occupation: \_\_\_\_\_

Occupation: \_\_\_\_\_

IRS PIN# : \_\_\_\_\_

Bank Routing No#: \_\_\_\_\_

Bank Account No#: \_\_\_\_\_

Mail/Print OR Electronic: \_\_\_\_\_

Dependent 1: \_\_\_\_\_ Dependent 2: \_\_\_\_\_

SS#: \_\_\_\_\_ SS#: \_\_\_\_\_

DOB: \_\_\_\_\_ DOB: \_\_\_\_\_

Gender: \_\_\_\_\_ Gender: \_\_\_\_\_

Dependent 3: \_\_\_\_\_ Dependent 4: \_\_\_\_\_

SS#: \_\_\_\_\_ SS#: \_\_\_\_\_

DOB: \_\_\_\_\_ DOB: \_\_\_\_\_

Gender: \_\_\_\_\_ Gender: \_\_\_\_\_

Current Address:

Current Phone Number:

Current Email:

\_\_\_\_\_  
Primary: \_\_\_\_\_

\_\_\_\_\_  
Alternative: \_\_\_\_\_

Are there any remarks, questions, or concerns about this years taxes that you would like me to be aware of?

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**Please include all tax information sent to you in the mail!**

Is there any income **NOT** listed on a form sent to you in the mail that I need to be aware of? For Self-Employment / Rentals / Businesses / Other – Please call for direct assistance



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<b>Investment Management Service Levels</b>			
	<b>Advisory</b>	<b>Management*</b>	<b>Direct - Class A/C</b>
	<b>Daily</b>	<b>Quarterly</b>	<b>Annually</b>
Investment Account Monitoring	✓	✓	✓
Financial Planning Reviews	✓	✓	✓
Budget & Goals Review	✓	✓	✓
Credit Counseling/Reviews	✓	✓	✓
Investment Performance Reviews	✓	✓	✓
Complimentary Insurance & Outside Account Review	✓	✓	✓
Life Event Planning	✓	✓	✓
Rebalancing of Investments	✓	✓	
Behavioral Finance Education	✓	✓	
Successor/Beneficiary/Trust Planning	✓	✓	
Tax Managed Investment Reviews	✓		
Tax Harvesting and Reviews	✓		
Dollar Cost Averaging Reviews	✓		
Business Consultation/Development	✓		
Discounts on Tax Preparation	10%	5%	
Other Comprehensive Services	✓		

\*Reference separate fee schedule for accounts under 100k

ALL CLIENT ACCOUNTS ARE CHARGED 1.25% ... this is a 0.50 % reduction from prior standard (2024) ...

Example below is using a management fee structure of maximum 1.25% on a new 10k investment, using American Funds – Investment Company of America, from the Capital Group, Page 7 of 70 2023 Prospectus, earning 5% annually comparing Investment Class Shares within Management Accounts versus Direct Commission Account Share Classes A and C, applicable to most qualified and non-qualified investment account structure. Management cost does not reflect the applicable clients tax rate schedule or deductible advantages.

Total Cost at Year	Institutional Share	Class A Share	Class C Share
1	\$155	\$631	\$235 / \$135
3	\$615	\$750	\$421
5	\$802	\$880	\$729

What makes the difference in cost?

- Class A Shares have an upfront load of 5.75% on new money and Ongoing Expense of 0.58%
- Class C Shares have a back end 1% charge if redeemed less than 1 yr. and Ongoing Expense of 1.33%
- Managed Account allow Institutional Class R shares with ONLY Ongoing Expense of 0.27%
- Managed Accounts carry Management Fee (possibly tax deductible\*); max total with fund expense 1.52%

\*Consult your personal tax advisor, accountant or CPA

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**JUSTIN POORE, MBA, EA**  
**2025-2026 FEE SCHEDULE**

**TAX CLIENT** \_\_\_\_\_

<b>1040/540 – or added Forms/Schedules on Table</b>	<b>300</b>		
<b>OUT OF STATE RETURNS</b>	<b>100</b>		
<b>Corporate and LLC Returns - Minimum</b>	<b>1000</b>		
Pricing for Corporate is hourly billing			
<b>Form 10</b>			
WAGES _____ w-2'S @	20.		
<b>Alternative Minimum tax Form 6251</b>	<b>80.</b>		
<b>Additional Medicare Tax Form 8959</b>	<b>45.</b>		
<b>Net Investment Tax Form 8960</b>	<b>45.</b>		
<b>Prior year minimum tax credit Form 8801</b>	<b>45.</b>		
<b>Form 8958 Allocation of community income</b>	<b>80.</b>		
<b>Qualified Business Income Deduction</b>	<b>75.</b>		
<b>Form 11</b>			
SCHEDULE B	40/60		
<b>Form 12</b>			
SCHEDULE D Dividends	40 / 80		
FOREIGN TAX CREDIT FORM 116	40.		
ESOP Plan detail	80.		
<b>Form 13</b>			
PENSION/IRA DIST 1099-R	\$20 each		
<b>Form 14</b>			
ALIMONY RECEIVED	20.		
OTHER INCOME _____ @ 10.			
<b>Form 15</b>			
NOL CURRENT YEAR/CARRYOVER	100		
NOL CARRY FORWARD	40		
<b>Form 16</b>			
SCHEDULE C			
SCHEDULE C	100 250 350		
DEPRECIATION			
+ _____ ITEMS @ 10.			
<b>Form 17</b>			
STOCK/SECURITY SALES <b>1099 B (SIMPLE)</b>	30		
CAPITAL GAINS WORKSHEET	100.		
SALE OF A RESIDENCE	300.		
SECTION 1031 EXCHANGE	500.		
<b>Form 18</b>			
ALL Schedule E Activities of Any Reason	100/200/300		
<b>Form 19</b>			
SCHEDULE F	100/150/200		
<b>Form 20</b>			
SCHEDULE K-1 _____ EA @ 40+ FORMS			
PARTNERS/OWNERS BASIS CALCULATION	200 ..		
<b>Form 24</b>			
IRA/RETIREMENT CONTRIBUTION _____ @ 5.			
SEP CALCULATION	45		
STUDENT LOAN _____ @ 5			
ALIMONY PAID	50		
<b>Form 25</b>			
<b>ITEMIZED DEDUCTIONS</b>	<b>200</b>		
<b>Form 26</b>			
NON CASH CONTRIBUTIONS	50.		
NON CASH CONTRIBUTIONS OVER 5000.00	100.		
<b>Form 27</b>			
MOVING EXPENSES	70.		
<b>Form 30</b>			
EMPLOYEE BUSINESS EXPENSES	50.		
<b>Form 31 Foreign Income Exclusion</b>	<b>200.</b>		
<b>Form 32 HSA Form 8889- 8962</b>	<b>50.</b>		
<b>Form 33</b>			
CHILD CARE CREDIT	40.		
<b>Form 37</b>			
QUALIFIED ADOPTION CREDIT	100		
<b>Form 38</b>			
EDUCATION CREDIT	75.		
<b>Form 39</b>			
<b>FEDERAL EARNED INCOME CREDIT</b>	<b>50.</b>		
OTHER CREDIT			
<b>Form 59</b>			
AMENDED FEDERAL TAX RETURN 1040/540	240.		
AMENDED FEDERAL ONLY	212.		

<b>Form 82</b>			
FOREIGN ASSETS REPORTING -FBAR			150. _____
DESEASED CLAIM FOR REFUND FORM 1310			50. _____
IRS TRANSCRIPT			
FULL IRS TRANSCRIPT REPORT			100. _____
<b>Total</b>			_____
<b>Applicable Discounts</b>			
<b>TOTAL AMOUNT DUE</b>			_____