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**PREPAID TAX PLANNING SERVICE RETAINER AGREEMENT**  
**TAX YEAR 2024**

Lexington Financial, Inc. is experienced in all areas of tax planning and has provided these services for more than sixteen years. Tax planning minimizes surprises at tax time. Everyone has an occasional change which affects income tax. These include new employment, gain or loss of a dependent, marriage or divorce, pension plan changes, IRA distributions, sale and/or purchase of a home, inheritance, mortgage refinancing, sales of stock, exercise of stock options, and most importantly the change of tax laws.

During our planning review, we will discuss your current year income and deductions and project your income tax balance due or overpayment. We will offer suggestions to increase your refund or decrease your balance due, and we will prepare Forms W-4 or Estimated Tax Vouchers as necessary. This tax planning service retainer provides for a one hour appointment or telephone conference at your convenience. Additional or longer appointments can always be provided at our normal rates.

This retainer provides for one full hour tax planning appointment or telephone conference at a mutually agreeable time during the period (May 1<sup>st</sup> to December 10<sup>th</sup> 2023) and includes the preparation of a comprehensive tax forecast for tax year 2023 and other necessary forms as noted above.

**2024 TAX PLANNING SERVICE ELIGIBILITY AND FEE**

With very few exceptions, this tax planning service is available to all clients. When you elect this tax planning service retainer, a fee of \$510 will be added to your bill. Give this tax planning service retainer your serious consideration. You may only elect to buy this service retainer at the time we prepare your year 2023 income tax return. You may not decide to buy this service retainer later. This service retainer is offered at the discretion of Lexington Financial, Group. (There are some situations when we cannot provide this service retainer).

**TO ACCEPT**

I/We elect the PREPAID TAX PLANNING SERVICE RETAINER AGREEMENT offered by Lexington Financial for tax year 2024. I/We hereby agree to the terms of this service.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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

Lexington Financial Authorization: \_\_\_\_\_