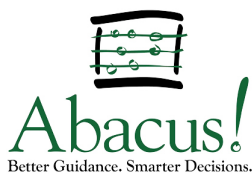


2025



Christenson Transportation Services, Inc.

# Income Tax Experience SERVICE ENROLLMENT

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

First

MI

Last

Social Security #: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Email: \_\_\_\_\_

Phone #: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Physical Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

The rest of your information is obtained from Christenson Transportation Services, Inc. . Please make sure this information is accurate with Christenson Transportation Services, Inc. personnel.

Income Tax Experience Option Agreement form must be completed. Select the option you've chosen:

☐

GROWTH

☐

TRUST

☐

CONFIDENCE

☐

COMPLIANCE

## FEES & SERVICE:

By signing this form, the client authorizes the company (Christenson Transportation Services, Inc. .) to withhold from the client's weekly settlement the fees for the level of service selected and then forward said fees to the service provider.

If the client is no longer employed or contracted with the company (Christenson Transportation Services, Inc.), this agreement will automatically be cancelled. If the client chooses to continue the service, previously paid fees will be applied to the service. Client will be requested to inform the service provider (Abacus) of this decision.

## AGREEMENT:

TO THE COMPANIES NAMED ABOVE: I hereby apply to participate in the *Tax Experience Service Enrollment* along with the attached *Income Tax Experience Option Agreement* and **AUTHORIZE** you to deduct from my settlement the necessary plan fee as set forth in this document. I have read, understand and agree to the fee structure. This **AUTHORITY** is to remain in effect until revoked by me in writing. I also understand that if I am no longer contracted to the participating company, my participation will be cancelled.

By signing this form, I also give the company (Christenson Transportation Services, Inc.) the authority to share information regarding my settlements to the service provider selected. The company (Christenson Transportation Services, Inc.) shall not be held liable for any loss of profit, indirect, special, exemplary, punitive, incidental or consequential damages that may be caused by/or resulting from the performance or non-performance of this service.

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

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

### FOR OFFICE USE ONLY:

Client Code: \_\_\_\_\_

Payroll Manager: \_\_\_\_\_

Driver Code: \_\_\_\_\_

Truck #: \_\_\_\_\_

EIN# \_\_\_\_\_

To Payroll: \_\_\_\_\_

LLC: Yes\_\_\_ No\_\_\_

Abacus! | Transportation Division

1835 E. Republic Rd., Springfield, Mo 65804 | Email: [transportation@abacuspro.com](mailto:transportation@abacuspro.com) | Phone: 417-380-5000



The purpose of this letter is to confirm the understanding between the undersigned (client) and Abacus. An accounting firm located in Springfield, Missouri.

1. Abacus, is engaged to prepare federal and state income tax returns on the client's behalf beginning with the year of the date of signature below. Abacus, will continue to prepare client's tax returns annually until client notifies Abacus, in writing that client no longer requires Abacus, services or client has terminated contract with sponsoring company.
2. Abacus, fees for preparing client's tax returns will be based on our normal operating procedures. Abacus, will collect additional fees as specified in Abacus, current rate schedule for any additional work required on client's behalf. Standard fees will be collected on a periodic basis through the company that the client operates under beginning with the month of engagement.
3. The client will need to be enrolled in the prepay program at year-end in order to qualify for the tax service enrollment for the current year. The client can increase their service level at any time for additional costs equal to the fee for the upgraded level but they cannot switch to a level that costs less than their current service level until the following year.
4. In order for the client to take advantage of **ALL** the services listed on the **Income Tax Experience Option Form for the service level selected by the client**; the client will be required to fill out and sign all required Tax Organizers and Engagement letters for each service that requires it. Clients who choose not to take advantage of all the services selected will not be refunded for services not utilized.
5. Abacus, has no responsibility for the funds collected by client's company until those funds are remitted to Abacus.
6. Client will ensure full payment of tax preparation fees prior to client receiving final tax returns.
7. **If client discontinues Abacus, services prior to year-end tax returns being filed, Abacus reserves the right to retain any/all funds paid to Abacus, for signup, setup, marketing expenses, and ongoing work related to client.**
8. Abacus, will use its judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretation of the law and what seem to be other supportable positions. Abacus, will resolve such questions in client's favor whenever possible.
9. Client represents that the information provided to Abacus, is accurate and complete to the best of the client's knowledge. Abacus, will review the information and supporting documentation and may ask for additional information or clarification of certain items. For most expenses the law specifically requires that records indicating the amount, time, place, and business purpose of the expense must substantiate any deductions.
10. Client agrees to allow Abacus, to gather settlement information from the company that client drives for. In addition, client agrees to allow Abacus, to share monthly operating statements with the company that the client drives for.
11. Abacus, may, at its option, for any reason automatically file for an extension on behalf of client to extend the tax return filing deadline. If client has not provided all documentation by February 1st for the proceeding tax year, Abacus, may very likely need to file an extension on behalf of client.
12. The client is reminded that the law imposes a penalty if taxpayer makes a substantial understatement for tax liability. The client is ultimately responsible for the tax return and therefore, should review them carefully before signing and filing them.
13. Should the client's return be selected for examination by tax authorities, Abacus will provide representation for the client before these authorities and prepare any refund claims or protest that may be necessary to obtain final determination of client's income tax liability. **Clients will be billed at Abacus standard rates, plus out-of-pocket expenses for these services.**
14. Client agrees that Abacus liability for damages under this agreement, regardless of the form of action, shall not exceed the total amount paid for the services described herein. This shall be client's exclusive remedy. This engagement letter shall be governed as to validity, interpretation, construction, effect, and in all other respects by the law and decisions of the state of Missouri.

**AGREED TO AND ACCEPTED:** The forgoing is in accordance with client's understanding of Abacus, engagement to provide tax services. By providing us the information necessary to prepare your tax returns, you accept the terms of our engagement outlined in this letter and the enclosed rate sheet.

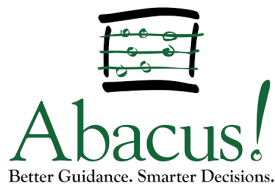
*Abacus!, appreciates this opportunity to serve you.*

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

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

"Abacus!", an independent member of the Crete Professionals Alliance, is the brand name under which Abacus CPAs LLC and Abacus Business Consulting, LLC provide professional services.

Abacus CPAs LLC and Abacus Business Consulting, LLC practice as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable laws, regulations, and professional standards. Abacus CPAs LLC is a licensed independent CPA firm that provides attest services to its clients, and Abacus Business Consulting, LLC provides tax and business consulting services to its clients. Abacus Business Consulting, LLC and Crete Professionals Alliance are not licensed CPA firms. The entities falling under the Abacus! brand are independently owned and are not liable for the services provided by any other entity providing the services under the Abacus! brand. Our use of the terms "our firm" and "we" and "us" and terms of similar import, denote the alternative practice structure conducted by Abacus CPAs LLC and Abacus Business Consulting, LLC..



Christenson Transportation Services, Inc.

# Income Tax Experience OPTIONS AGREEMENT

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

2025 SERVICES:	GROWTH 	TRUST 	CONFIDENCE 	COMPLIANCE 
Initial Onboarding Meeting	✓	✓	✓	✓
Settlement Entries from Contract Company	✓	✓	✓	✓
Year-End Out-of-Pocket Business Expense Review & Entry	✓	✓	✓	✓
Federal & State Income Tax Return Preparation	✓	✓	✓	✓
Delivery Meeting to Review & Discuss Tax Results	✓	✓	✓	✓
Tax Return Correspondence	✓	✓	✓	✓
Secure Online Document Portal	✓	✓	✓	✓
Monthly Newsletters	✓	✓	✓	✓
Routine Phone Calls & Emails	✓	✓	✓	✓
Customized Qtrly Estimated Tax Recommendations	✓	✓	✓	
Tax Return Consulting Service ≤ 2hrs per year	✓	✓	✓	
Monthly Out-of-Pocket Business Expense Review & Entry	✓	✓		
Online Quarterly Tax Estimate Payments	✓			
Business Growth Tax Planning Meeting	✓			
Federal Tax Correspondence Monitoring	✓			

**SERVICES:** Initial the box for the option you choose:

*Average weekly service charges listed as options for each level*

GROWTH	TRUST	CONFIDENCE	COMPLIANCE
\$37.50	\$24.50	\$18.50	\$13.50

☐☐☐☐

**SECURITY: Federal 1040 Audit Protection Service:** Receive IRS Audit Protection Service for your Tax Return(s) prepared by Abacus in the year(s) of enrollment. If you would like to add this service to ANY service option chosen above initial this box.

☐

*The security option yearly fee is \$150 and will be included in the catchup fee payment schedule.*

**Fee Collections:** Please read the statement below and request a fee schedule today from an Abacus Team Member.

*Enrollments received after January 1st will incur additional fees to catchup payments for the yearly service option selected. Payment for services will be based on the weekly amount corresponding to chosen services option, with catchup fees typically charged over 15 weeks. The catchup fee payment schedule is available upon request. Services and fees will renew each calendar year. See Engagement Letter for additional terms and conditions.*

(Agreed to and accepted by) Signature: \_\_\_\_\_

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

**Abacus ! | Transportation Division**

1835 E. Republic Rd., Springfield, Mo 65804

Email: [transportation@abacuspro.com](mailto:transportation@abacuspro.com) | Phone: 417-380-5000



**Initial Onboarding Meeting:** Abacus will contact you, after enrollment, to gather your filing status, dependents, additional income sources, and tax filing history. Abacus will also discuss initial business start-up questions such as income tax filing requirements, business deductions, and tax payments.

**Settlement Entries from Contract Company:** Abacus will enter settlements from your Contract Company into your accounting file in order to record business income, expenses, assets, and liabilities reported on the settlements, in an effort to compile the necessary information towards the preparation of Form Schedule C Profit & Loss for your income tax return.

**Year-End Out-of-Pocket Business Expense Review & Entry:** Abacus will review and audit your year-end cash expense records for accuracy and completeness based on the firm's industry knowledge. These cash expenses will be filed in your tax file with the firm and will be entered into your accounting file in an effort to compile the necessary expenses in order to prepare your Form Schedule C Profit & Loss for your income tax return.

**Federal & State Income Tax Return Preparation:** Abacus will prepare your individual federal income tax return on a Form 1040. This individual tax return will include (1) over-the-road transportation related Form Schedule C, and (1) individual state income tax return. Additional forms and/or state, city, and local tax required filings will result in an additional fee(s).

**Delivery Meeting to Review & Discuss Tax Results:** Abacus will contact you to discuss the results of the your tax return and answer any related questions as to how the tax return amounts were figured. Abacus will send and/or retrieve the required signatures to file the tax return(s) for you.

**Tax Return Correspondence:** During the preparation of your income tax return Abacus may have additional questions or requests for information not obtained on the Tax Organizer to prepare your income tax return. *Note: A completed Tax Organizer is required in order for Abacus to prepare your tax return.*

**Secure Online Document Portal:** This valuable service will provide you with a cloud-based, secure online portal where you can send, retrieve, and view all documents submitted to Abacus that are required to provide your tax services.

**Monthly Newsletters:** Your monthly newsletter is emailed directly to you and developed specifically for small business owners in the Transportation Industry. Abacus will provide you with relevant, specific and current information related to you, as a taxpayer, in an effort to provide you better guidance so you can make smarter decisions.

**Routine Phone Calls & Emails:** Abacus will contact you prior to the end of the year to remind you of the upcoming tax deadline and information the firm will need to prepare your tax return. This will help you plan for the upcoming tax filing season. Abacus will also contact you via email throughout the year when important tax changes are enacted and to remind you about upcoming deadlines such as quarterly estimate tax payment dates.

**Customized Qtrly Estimated Tax Recommendations:** An Abacus tax professional will prepare quarterly estimate(s) customized to your business. Abacus will prepare these estimate(s) prior to the estimate payment due date. These estimate(s) will take into account all of the information you provided in your initial onboarding meeting and/or previous tax filings. When you enroll in this valuable service, you will not be surprised by a large tax bill when it is time to file your tax return at the end of the year. The quarterly estimate information helps you plan and save in advance.

**Tax Return Consulting Service ≤ 2 hrs per year:** Abacus will provide you with up to 2 hours of tax consulting throughout the year. Abacus will help you plan for your upcoming tax year and assist you with your questions prior to sending in your tax information. When you have additional questions or considerations regarding your individual income tax situation, our knowledgeable customer service staff will provide you with assistance and guidance to help you throughout the calendar year.

**Monthly Out-of-Pocket Business Expense Review & Entry:** Abacus will review and audit your monthly cash expense records for accuracy and completeness based on the firm's industry knowledge. These cash expenses will be filed in your tax file with the firm and they will be entered into your accounting file in an effort to compile the necessary expenses to prepare your income tax return. By sending in monthly cash expenses, Abacus will be able to prepare more accurate quarterly estimate(s) for you to plan for your taxes due.

**Online Quarterly Tax Estimate Payments:** This valuable service will allow Abacus to pay quarterly estimated tax payment(s) on your behalf using the bank account information you have provided on the required separate Quarterly Tax Payment Authorization form. This service is only available for federal and state tax payments in which an online ACH bank payment can be made and paid as a guest (where there is no specific online login required).

**Business Growth Tax Planning Meeting:** Abacus Professionals will provide up to a 2 hour scheduled meeting in the calendar year to discuss your specific related tax growth questions. The meeting will be scheduled with a professional that pairs up directly with your business growth planning desires. Business growth planning meetings may contain the following criteria: Transportation Business growth, hiring new drivers, adding more trucks, changing entity types such as S-Corp, and additional business consulting for those with other sources of revenue such as rental properties, farms, and other businesses.

**Federal Tax Correspondence Monitoring:** As an over the road driver, it might be difficult to monitor any tax notices while you are away from home. By selecting this service option, a Federal (POA) will be put on file authorizing important notices to be mailed directly to Abacus. Abacus will then inform you of the notice and offer guidance on how best to reply. A State POA can be filed if requested by client. For an additional fee, Abacus can even call the taxing agency or prepare a response letter if requested.