

Request to Prepare 2025 Form 990-T

I am requesting Equity Specialty Services, prepare Form 990-T, including all required attachments and forms. I understand and agree that all income and expenses pertaining to the investments held in my Account must be deposited or dispersed directly from my Account. Further, I agree to provide copies of all information applicable for the preparation of Form 990-T.

I understand the Form 990-T filing requirement is a completely separate return and not associated with my personal tax return.

I am requesting Equity Specialty Services provide the services, which will be assessed at the fees listed below, based on the scope of work needed.

2025 FEE SCHEDULE FOR UDFI SERVICES	
Federal Form 990-T Filing for Debt-Financed Real Estate Property	\$500
Each Additional Property	\$250
Each Sale of Debt-Financed Real Estate Property	\$200
State Return (<i>if applicable</i>)	\$100
Amended Form 990-T	\$150
Federal Extension of Time to File — Form 8868 (<i>if request is received after 3/31/26</i>)	\$75
State Extension of Time to File (<i>if required</i>)	\$75
Account Research / Amortization Schedule Preparation	\$75 / hour
Late Documentation Fee	\$75

I acknowledge Equity Specialty Services will email an invoice for tax preparation services, and I am responsible for payment prior to the preparation of Form 990-T. I understand that it is my obligation to file Form 990-T and my obligation to make any estimated tax payments due and owing to the IRS. I acknowledge that Equity Specialty Services is only preparing Form 990-T for me and is relying upon the information and documentation I provide. Equity Specialty Services is not obligated to provide estimated tax payments or to provide me with any advice or direction as to taxes I owe, other than preparing Form 990-T. I understand that filing Form 990-T is my obligation and Equity Specialty Services shall not be liable for any tax penalties and fees associated with a late filing or tax payment.

Signature: _____ Date of Request: _____

Name: _____

Account Number: _____

Email: _____

IMPORTANT NOTE:

If this request and all required information is not received prior to March 15, 2026 we cannot guarantee the request will be completed by the IRS filing deadline of April 15, 2026. Requests received after April 1, 2026 may require a filing extension at your cost.