



Request for Equity Trust to Prepare 2019 Form 990-T

I am requesting Equity Trust Company 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 ETC provides the services, which will be assessed at the fees listed below, based on the scope of work needed.

Equity Trust Company 2019 Fee Schedule for UBIT Services	Fee
Federal Form 990-T filing for Debt-Financed Real Estate Property	\$400
Each Additional Property	\$150
Each Sales of Debt-Financed Real Estate Property	\$200
Each LLC/LP Investment	\$100
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 4/1/2020)</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 Trust Company 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 Trust Company is only preparing Form 990-T for me and is relying upon the information and documentation I provide. Equity Trust Company 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 Trust 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, 2020 we cannot guarantee the request will be completed by the IRS filing deadline of April 15, 2020. Requests received after April 1, 2020 may require a filing extension at your cost.