



ENGAGEMENT SCHEDULING AND INITIAL PLANNING FORM

To assist us with our engagement planning, we are requesting that you complete this short form. Please contact us with any questions or concerns.

Engagement Information

Entity Name: _____

Services to be provided: *Please select from the dropdown list for each category.*

Financial statement services:

Tax services:

Primary Contact Person(s): _____

Fiscal Year 2026 Recap

1. Was there anything new or different for the entity for the fiscal year ending June 30, 2026? If yes, please briefly describe below:

2. Did the entity receive or expend federal awards in excess of \$1,000,000 during the year ending June 30, 2026?

Yes No

3. Is there anything else of which we should be made aware in planning for the scheduling of the engagement?

4. Are there any issues or matters you would like to discuss with us in the next few weeks? *If so, we will reach out to set up a meeting.*

Engagement and Reporting Timeline

1. When will the June 30, 2026 records and financial and other requested information be ready for engagement procedures to commence?

2. What is your desired timeframe for fieldwork, whether onsite or virtual? *We cannot guarantee that these preferred dates will be selected for fieldwork, but we will use this data for planning and reach out to you to schedule final dates. Please keep in mind, we generally need 6 to 8 weeks from the start date to provide a draft of the report.*

a. First choice: _____

b. Second choice: _____

3. Are there any dates or ranges of time in which you will be unavailable?

4. What is your desired timeframe for delivery? Please provide dates and times of meetings, if available. Please indicate if there is any flexibility or if there are hard reporting deadlines.

a. Delivery of the draft to management:

b. Presentation of the draft report to the finance committee:

c. Presentation of the report to the board/council:

Fieldwork Preferences

1. Is your preference to have us perform the engagement fieldwork onsite or offsite/virtually?

Onsite

Offsite/Virtual *(will extend completion date)*

Either is fine