

Your offer at a glance

Three hours with Ebot Mbi, CPA, EA. Twenty strategies. A plan that fits you, and a clear choice: do it yourself, or have us do it with you.

Plain-language summary. The binding terms are Exhibit A (Terms of Purchase) and Exhibit B (Limited-Scope Engagement Letter), which control if anything differs.

When Saturdays, October 24 – December 19, 2026 10:00 AM – 1:00 PM Central • session chosen at checkout	Where 4425 W Airport Fwy, Ste 595 Irving, Texas 75062 • 10 seats per session	Price \$1,000 founding price through Dec 19, 2026 • \$1,500 after
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What your \$1,000 includes

1 Your seat The live three-hour workshop. Ask your questions in the room.	2 The Strategy Binder 77 strategies with worked case studies, delivered the moment you buy. Yours to keep.	3 Office hours + your DIY Blueprint A private session with Ebot (up to 45 minutes), then a written plan of up to five strategies that fit your facts.	4 A \$1,000 credit Applied in full if you hire us to implement. Full-service engagements start at \$5,000, so you'd pay \$4,000.
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Two ways forward after the workshop

Do it yourself (included)	Full service (from \$5,000, less your \$1,000 credit)
You get the Blueprint: steps, deadlines, the law and the numbers. You carry it out with your own team. We don't file, form entities, run payroll or represent you.	We implement the strategies with you and take responsibility for the work we do, under a written engagement letter that sets the scope and fee.

Know this before you buy

- All sales are final.** No refunds, including if you don't attend. If you miss the workshop, you still have the Binder, your office hours, your Blueprint and your credit.
- Can't make your Saturday?** Move your seat once, or send someone in your place, by emailing ebot@ebotcpa.com at least 48 hours before the session.
- Use by April 30, 2027.** Your office hours, Blueprint and \$1,000 credit expire on that date. They're for you, your spouse or a business you own.
- Do-it-yourself means you implement.** Your office hours and Blueprint come under a one-page engagement letter you sign first. It limits our liability to the fee you paid.
- The materials are licensed to you.** Your copy carries your name. Please don't share or post it.
- The workshop is education.** Advice for your situation comes only in your office hours and Blueprint, or under a full-service engagement.
- If we cancel or reschedule,** you choose a full refund or another session.

How it works: choose your Saturday → read and accept the terms (Exhibit A) → pay → your Binder and confirmation arrive by email → sign the one-page engagement letter (Exhibit B) and book your office hours → attend → receive your Blueprint → decide: do it yourself, or full service with your credit.

This page is a summary. The binding terms are Exhibit A (Terms of Purchase) and Exhibit B (Limited-Scope Engagement Letter); if anything here differs, the exhibits control. Examples are hypothetical; results vary. General education, not tax advice for your situation until an engagement letter is signed. ebotCPA PLLC · Ebot Mbi, CPA, EA · 817-214-4014 · ebot@ebotcpa.com · Version 2026-10-07.

Terms of Purchase

Accepted at checkout. Version 2026-10-07.

1. **What you are buying.** The fee is the price of the Workshop Package, which has four parts: (a) a **seat** at the live three-hour session you select; (b) the **ebotCPA Strategy Binder**, covering 77 tax strategies with worked case studies, delivered digitally when your purchase is complete and licensed to you under section 8; (c) **one private office-hours session** with Ebot Mbi, CPA, EA, of up to 45 minutes, in person in Irving or by Zoom, followed by a written **DIY Strategy Blueprint** of up to five strategies that fit the facts you provide; and (d) a **\$1,000 credit** toward a full-service Tax Strategy engagement.
2. **Do-it-yourself means you implement.** The Blueprint is guidance for you to carry out yourself. ebotCPA PLLC does not implement it, file anything, form entities, run payroll, sign documents, represent you, or monitor results unless you sign a separate full-service engagement. The office-hours session and Blueprint are provided only under the one-page Limited-Scope Engagement Letter you sign before the session.
3. **No refunds.** All sales are final. The fee is not refundable, in whole or in part, for any reason other than those in section 5, including if you do not attend the live session, leave early, or do not schedule your office hours. If you miss the live session, you keep the Binder, and your office-hours session, Blueprint and credit remain available until the use-by date in section 7.
4. **One seat transfer.** Once per purchase, you may move your seat to any later Saturday session with open seats through December 19, 2026, or send another person in your place, by emailing ebot@ebotcpa.com at least 48 hours before your session begins.
5. **If we cancel or reschedule.** If ebotCPA PLLC cancels or reschedules your live session for any reason, including weather or circumstances beyond our control, you may choose a full refund or a seat at another session.
6. **Pricing.** Founding sessions through December 19, 2026 are \$1,000. Sessions after that date are \$1,500. Full-service Tax Strategy engagements start at a base fee of \$5,000; the final fee is set by scope in a written engagement letter.
7. **Use-by date, credit and transfer.** Your office-hours session must be held, and any full-service engagement letter signed, by **April 30, 2027**. After that date the office-hours session, Blueprint and credit expire without cash value. The \$1,000 credit applies in full to a full-service Tax Strategy engagement (for example, you pay \$4,000 on a base engagement). The credit and office hours may be used by you, your spouse, or a business you own, and are otherwise not transferable. The credit is a promotional discount: it has no cash value, is not refundable, is not sold separately, and cannot be combined with another credit.
8. **Use of materials.** The Binder, case studies, slides, Blueprint and session content are owned by ebotCPA PLLC and licensed to you for your personal use and the use of your own business. Your copy is marked with your name. You may not copy, record, resell, publish, post or share them, in whole or in part, without written permission.
9. **Education first.** The live workshop is general education and does not create a client relationship or provide advice for your situation. Advice for your situation is provided only in the office-hours session and Blueprint, under the Limited-Scope Engagement Letter, or under a full-service engagement letter. Examples are hypothetical; results vary. The material reflects federal tax law as of the session date.
10. **Conduct and recording.** We may decline entry to or remove anyone who disrupts a session, without refund. No audio or video recording by attendees.
11. **Your information.** We use your contact information and any documents you provide only to deliver the Workshop Package and to follow up about our services. We do not sell it. You may opt out of marketing at any time.
12. **General.** Texas law governs these terms. Disputes will be resolved in the courts of Dallas County, Texas, including justice court for small claims. If any provision is unenforceable, the rest remains in effect. These terms, and the Limited-Scope Engagement Letter if you sign it, are the entire agreement for your purchase.
13. **Order of documents.** The one-page Offer at a Glance is a plain-language summary for convenience. If anything in it differs from these Terms or the Limited-Scope Engagement Letter, these Terms and the Engagement Letter control.

DIY Strategy Blueprint: Limited-Scope Engagement Letter

Signed before your office-hours session.

Client: _____ (and spouse/business, if included: _____) **Date:** _____

1. **What we will do.** Hold one private office-hours session of up to 45 minutes and then deliver a written DIY Strategy Blueprint identifying up to five federal tax strategies that appear to fit the facts you provide, with the steps, deadlines, authority and an estimate of the effect for each. The Blueprint is based on federal tax law as of its date and on the facts in your intake.
2. **What we will not do.** We will not implement any strategy, prepare or file returns or elections, form or change entities, set up payroll or retirement plans, sign documents, represent you before any taxing authority, review your books or records for accuracy, provide state tax, legal or investment advice, or update the Blueprint for later changes in law or facts, unless you sign a separate full-service engagement letter.
3. **Your responsibilities.** You will give us complete and accurate facts, confirm them in the intake, and tell us anything that would change them. You decide whether and how to implement each strategy, and you are responsible for doing so correctly and on time, and for obtaining any legal, investment or state tax advice you need. Investment decisions belong with your registered investment adviser.
4. **Reliance.** We will rely on the facts you provide without verifying them. A strategy that depends on facts you did not disclose, or that you implement differently from the Blueprint, is outside our advice.
5. **RESPONSIBILITY FOR IMPLEMENTATION AND LIMIT OF LIABILITY. YOU AGREE THAT EBOTCPA PLLC IS NOT RESPONSIBLE FOR ANY TAX, PENALTY, INTEREST, COST OR LOSS ARISING FROM HOW YOU OR ANYONE OTHER THAN US IMPLEMENTS, OR FAILS TO IMPLEMENT, THE BLUEPRINT. TO THE FULLEST EXTENT TEXAS LAW ALLOWS, AND EVEN IF CAUSED IN WHOLE OR IN PART BY OUR OWN NEGLIGENCE, OUR TOTAL LIABILITY FOR THIS ENGAGEMENT IS LIMITED TO THE FEES YOU PAID FOR THE WORKSHOP PACKAGE. THIS LIMIT DOES NOT APPLY TO GROSS NEGLIGENCE, FRAUD OR INTENTIONAL MISCONDUCT.** Client initials: _____
6. **Fees.** This engagement is included in your Workshop Package; there is no additional fee. Your \$1,000 credit toward a full-service engagement is described in the Terms of Purchase.
7. **Records and confidentiality.** We keep your information confidential under our professional obligations and use the documents you provide only for this engagement. We keep our workpapers for three years.
8. **Independence.** If you are, or become, an audit, review or other attest client of Ebotagborndang Mbi, PLLC, tell us before signing; section 5 will not apply and we will engage you on different terms.
9. **Term.** This engagement ends when the Blueprint is delivered, and no later than April 30, 2027. Texas law governs; venue is Dallas County, Texas.

Client signature: _____ Ebot Mbi, CPA, EA, for ebotCPA PLLC: _____