November 24, 2026

Dear Valued Client,

When I started Advanced Accounting in 1996, I never imagined how many of you would become part of my life. I've watched your businesses grow, your kids head off to college, and your retirements finally arrive. Working with you has been one of the great joys of my life, and I wanted you to hear this news from me first.

As many of you know, earlier this year I stepped into a full-time role as CFO of Dash.fi, one of my longtime clients. That chapter is wrapping up, and I'm now putting all of my focus on Advanced Financial Management, my independent RIA firm, and growing it. To make that possible, I needed the right person to care for our tax and accounting clients. I wanted someone who treats people the way we always have, and I found him. This fall, I began transitioning the firm to Keith Phillips, CPA, and I couldn't feel better about who is taking care of you from here.

Keith has spent eleven years in public accounting, and for the past seven he has also run his own tax and accounting practice for individuals and business owners. He works from our Texas office in Kaufman, Texas, and, like the rest of our team, serves clients virtually wherever they may be. He's the kind of person who picks up the phone when you need to have a conversation, listens before he speaks, and takes the time to dig into your questions and get the details right. What I appreciate most about Keith is his work ethic and how much he genuinely cares about the individuals and business owners he serves. He's hungry to learn, quick to roll up his sleeves, and determined to do right by every client. I trust him completely, and he has my full support as he leads Advanced into its next chapter.

What this means for you: Expect minimal changes day to day. Your client concierge, bookkeeper, tax preparer, and Illyce are all continuing with the transition, and they'll keep handling your work the way they always have. Your TaxDome portal, our phone number, our processes and our technology stay the same, and the change in ownership doesn't change your fees outside of our standard annual increases to keep up with inflation. What you gain is Keith: he's in the practice full-time, and he personally reviews every return and every set of books before it goes out.

What about me? I'm not going anywhere just yet. I'll be working alongside Keith, Illyce and the team through the 2027 tax season to make sure every handoff is a good one.

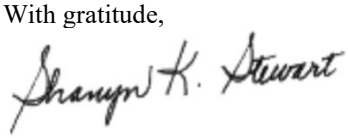
What about Advanced Financial Management? If you're also a client of Advanced Financial Management, our independent RIA firm, nothing is changing there. The team and I are still here full-time and dedicated to those clients, and Advanced Tax and Advanced Financial Management will continue to work side by side to meet the needs of our joint customers.

Is there anything I need to do? Not right now. Over the next few months, we'll send a few quick items through TaxDome: an updated IRS power of attorney (Form 2848) so Keith and the team can keep speaking with the IRS on your behalf, your 2026 tax year engagement letter, and a short consent form that lets our team continue to work with your tax information. Each takes about a minute to complete, and we'll walk you through them. You'll also start to see our refreshed name, Advanced Tax & Financial Services, on emails and statements.

You'll be hearing from Keith soon with a personal introduction. If you'd like to talk sooner, message us in TaxDome or call (734) 856-5698.

Thank you for trusting me with so much for so long. You're in good hands.

With gratitude,



Shanyn Stewart, CFEd, EA | Founder