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**Re: Following Up**

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**From** JE Halstead, III <james@lakebridgeaccounting.com>

**Date** Fri 9/12/2025 6:15 PM

**To** Gary Dolan <10garyedolan@gmail.com>

**Cc** Paul Quinn <firstcitydevelop@mac.com>; Rondia Graves-Lake Bridge <rondia@lakebridgeaccounting.com>; Kevin Woods <kevin@lakebridgeaccounting.com>

Hey Gary,

Just wanted to check in and see if you'd had a chance to sign the engagement letter yet. No rush, brother — I know you've had your hands full.

I also wanted to say I hated missing the golf event on the 10th. I know it was a big one, and I would've been there if a client emergency hadn't pulled me away last minute. I appreciate what you're doing for the veteran community — that's the kind of thing that makes a real difference.

Looking forward to catching up soon.

Sua Sponte,

Jimmy

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**From:** Gary Dolan <10garyedolan@gmail.com>

**Sent:** Wednesday, September 3, 2025 9:38 AM

**To:** JE Halstead, III <james@lakebridgeaccounting.com>

**Cc:** Paul Quinn <firstcitydevelop@mac.com>

**Subject:** Re: Updated Engagement Letter for AVHI — brief summary of changes

Brother James,

I thoroughly enjoyed and appreciated our conversation yesterday. Thank you for so quickly agreeing to reduce the upfront down payment in the agreement to the sum of \$10,000.00. I look forward to a tremendously beneficial long term relationship.

RLTW

Gary

On Tue, Sep 2, 2025, 6:43 PM JE Halstead, III <[james@lakebridgeaccounting.com](mailto:james@lakebridgeaccounting.com)> wrote:

| Gary,

I've made a few clarifying edits to the engagement letter to keep everything clean and aligned with best practices. I've attached (1) a redline so you can see each change in context and (2) a clean final for signature.

Quick summary of the updates:

- Retainer wording clarified as an **advance deposit applied to fees/expenses** (with any unused balance refundable).
- **Billing clarity:** same rates; added a gentle collections ladder (pause after 15 days overdue; termination after 30) to set expectations.

If everything looks good, I can route the clean version for e-signature. If you prefer any tweaks, send them over and I'll turn a quick revision.

Appreciate you, and excited to get this moving.

**J. Edgar Halstead, III**

Director of Tax & Compliance

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