

[Date]

[Client Name]

[Client Address]

[City, State, Zip]

Dear [Client Name],

This letter confirms the terms of our engagement to prepare your federal and state individual income tax returns for the tax year ending [Year].

Scope of Services

We will prepare the following tax returns based on the information you provide:

- U.S. Individual Income Tax Return (Form 1040)
- State Income Tax Return(s) for [State Name(s)]
- Required disclosures for foreign financial assets (FBAR/Form 8938), if applicable
- Gift tax returns (Form 709), if specifically requested

Client Responsibilities

You are responsible for the accuracy and completeness of the information provided, including income from all sources, capital gains, private equity investments, and foreign accounts. You must maintain documentation to support all deductions and credits claimed. We will not audit or verify your data, though we may ask for clarification.

Professional Fees

Our fees are based on the complexity of your financial profile and the time required by our professionals. Our estimated fee for these services is \$[Amount], plus out-of-pocket expenses. This estimate may change if significant additional complexity is encountered. A retainer of \$[Amount] is required to begin work.

Confidentiality and Data Security

We maintain strict confidentiality regarding your financial and personal information. We use industry-standard security measures to protect your data. We will not disclose your information to third parties without your written consent, unless required by law.

Filing Deadlines

We must receive all necessary tax documentation by [Date] to ensure timely filing by the April 15 deadline. If information is received later, we will file an extension on your behalf; however, an extension to file is not an extension to pay taxes due.

Agreement Terms

Please sign and return a copy of this letter to indicate your acceptance of these terms.

Sincerely,

[Your Name/Firm Name]

Accepted by:

Signature: _____

Date: _____