

[Date]

[Client Name]

[Client Address]

[City, State, Zip]

Dear [Client Name],

This letter confirms the terms of our engagement to assist you with the preparation of your individual income tax returns for the tax year [Year].

Scope of Services

We will prepare your [Federal / State / Local] individual income tax returns based on the information you provide. We will not audit or otherwise verify the data you submit, although we may ask for clarification if the information appears incomplete or inconsistent.

Client Responsibilities

It is your responsibility to provide all necessary information, including income statements (W-2s, 1099s), expense records, and documentation for deductions or credits. You represent that the information you provide is accurate and complete to the best of your knowledge. You are responsible for maintaining the required documentation to support the data on your tax returns in the event of an examination by taxing authorities.

Professional Standards

We will use our professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between authorities' interpretations of the law. Unless otherwise instructed by you, we will resolve such questions in your favor if there is reasonable justification for doing so.

Fees

Our fees for these services will be based on [Flat Fee / Hourly Rates] plus out-of-pocket expenses. Payment is due upon delivery of the completed tax returns.

Electronic Filing

Upon your review and signature of the e-file authorization forms (Form 8879), we will electronically file your returns with the appropriate taxing authorities. We cannot file your returns until we receive these signed forms.

Please sign and return a copy of this letter to indicate your acknowledgment of, and agreement with, the arrangements for our services.

Sincerely,

[Firm Name]

[Professional Name/Title]

Accepted by:

Signature: _____

Date: _____