

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Engagement for Individual Tax Return Preparation and Tax Notice Resolution

Dear [Client Name],

This letter confirms the terms of our engagement and the nature of the services we will provide for the tax year [Year].

1. Scope of Tax Preparation Services

We will prepare your [Year] Federal and [State] individual income tax returns based on the information you provide. We will not audit or verify the data you submit, although we may ask for clarification.

2. Tax Notice Resolution Services

We will assist you in resolving the specific tax notice dated [Notice Date] from the [IRS/State Tax Authority] regarding [Brief Description of Issue]. Our services include:

- Reviewing the notice and your relevant tax records.
- Drafting correspondence to the tax authority.
- Representing you in communications with the tax authority regarding this specific matter.

3. Client Responsibilities

You are responsible for the accuracy and completeness of all information provided. You must maintain all documentation (receipts, canceled checks, etc.) required by law to support your tax positions. You are responsible for the final review and signing of the tax returns.

4. Professional Fees

Our fees for these services are as follows:

- Tax Return Preparation: \$[Amount]
- Notice Resolution: \$[Amount or Hourly Rate]

Payment is due upon receipt of the completed returns or as progress is made on the notice resolution.

5. Limitation of Liability

Our liability for any professional error is limited to the amount of fees paid for these services.
We are not responsible for penalties or interest resulting from missing or inaccurate information
provided by you.

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

Sincerely,

[Your Name/Firm Name]

[Your Title]

Accepted by:

_____ Date: _____
[Client Name]