

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Engagement for Self-Employed Tax Return Preparation

Dear [Client Name],

This letter confirms the terms of my engagement to prepare your [Year] federal and state income tax returns. As you are self-employed, this engagement specifically includes the preparation of Schedule C (Profit or Loss from Business) and all related self-employment tax forms.

1. Scope of Work

I will prepare your [Year] individual income tax returns based on the information you provide. I will not audit or verify the data you submit, although I may ask for clarification. It is your responsibility to provide all necessary information, including business income, expenses, and home office details if applicable.

2. Your Responsibilities

You confirm that you have adequate documentation to support all income and expenses claimed, including logs for vehicle use and receipts for business purchases. You are responsible for the accuracy of the final returns; therefore, you should review them carefully before signing.

3. Fees

My fee for these services will be [Insert Amount or Hourly Rate]. This fee is based on the complexity of the returns. Payment is due upon completion of the returns and prior to electronic filing.

4. Record Retention

You are responsible for maintaining your own business records and receipts for at least seven years. I will provide you with a copy of the completed tax returns for your files.

5. Limitation of Liability

My liability for any errors is limited to the amount of the fee paid for these services. I am not responsible for penalties or interest resulting from incomplete or inaccurate information provided by you.

If the terms outlined above are satisfactory, please sign and return a copy of this letter.

Sincerely,

[Tax Preparer Name]

[Company Name]

Accepted by:

Signature: _____

Date: _____