

[Date]

[Client Name]

[Trust or Estate Name]

[Address]

[City, State, Zip Code]

Re: Engagement for Fiduciary Tax Return Preparation

Dear [Client Name],

This letter confirms the terms of our engagement to prepare the federal and state income tax returns for [Name of Trust or Estate] for the tax year ending [Year].

Scope of Services

We will prepare the following tax returns:

- Form 1041, U.S. Income Tax Return for Estates and Trusts
- [State Name] Form [Form Number]
- Schedule K-1s for distribution to beneficiaries

Client Responsibilities

As the fiduciary, you are responsible for providing all necessary information, including income statements, expense receipts, and distribution records. You represent that the information you provide is accurate and complete to the best of your knowledge. We will not audit or verify the data you submit, though we may ask for clarification.

Professional Fees

Our fees for these services will be based on [our standard hourly rates / a flat fee of \$_____]. This fee does not include representation in the event of an audit or additional consulting services, which would be billed separately.

Records Retention

It is your responsibility to retain all documents, canceled checks, and other data that form the basis of the income and deductions. These should be kept for at least seven years.

Signatures

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

Sincerely,

[Firm Name]
[Preparer Signature]

Accepted by:

Signature: _____

Title (Fiduciary): _____

Date: _____