

[Date]

[Client Name]

[Organization Name]

[Address]

[City, State, Zip Code]

Dear [Client Contact Name],

This letter confirms the terms of our engagement with [Organization Name] and clarifies the nature and extent of the tax services we will provide.

Scope of Services

We will prepare the following federal and state tax returns for the year ended [Fiscal Year End Date]:

- IRS Form 990 (Return of Organization Exempt from Income Tax)
- [State Form Name, if applicable]
- [Other applicable forms, e.g., Form 990-T]

We will not audit or verify the data you submit. However, we may ask for clarification if the information appears incomplete or inconsistent. It is your responsibility to provide all information required for the preparation of complete and accurate returns.

Organization Responsibilities

The organization's management is responsible for:

- Maintaining adequate financial records and internal controls.
- Ensuring compliance with all laws and regulations applicable to non-profit entities.
- Reviewing the final returns for accuracy before they are filed.
- Providing documentation to support charitable contributions and program service accomplishments.

Fees

Our fee for these services will be based on [Fixed Price / Hourly Rate]. An initial retainer of [Amount] is required. Fees are due upon delivery of the completed tax returns.

Record Retention

You should retain all documents, canceled checks, and other data that form the basis of these returns for at least seven years. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority.

If the terms described above are acceptable to you, please sign the enclosed copy of this letter and return it to us.

Sincerely,

[Your Name/Firm Name]

[Your Title]

Accepted by:

Signature: _____

Title: _____

Date: _____