

Date: [Insert Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Engagement for Tax Advisory and Consulting Services

Dear [Client Name],

This letter confirms the terms and objectives of our engagement to provide tax advisory and consulting services to [Client Name/Company Name].

1. Scope of Services

We will provide the following consulting services:

- Analysis of specific tax implications regarding [Insert Project Description].
- Strategic tax planning and structuring advice.
- Research and interpretation of relevant tax laws and regulations.
- [Insert Additional Services as needed].

2. Client Responsibilities

To perform our services, you agree to provide all necessary financial records and information in a timely manner. We will rely on the accuracy and completeness of the information you provide without independent verification. It is your responsibility to maintain all documentation required by tax authorities.

3. Fees and Billing

Our fees for these services will be based on [Insert Basis: e.g., hourly rates / a fixed fee of \$XXX]. Expenses such as filing fees or travel will be billed separately. Invoices are due and payable [Insert Terms, e.g., within 30 days of receipt].

4. Limitation of Liability

Our advice is based on current tax law. We are not responsible for changes in legislation or court interpretations that occur after the date of our advice. Our total liability for any error or omission is limited to the amount of fees paid for this specific engagement.

5. Confidentiality

We will maintain the confidentiality of all information provided to us during this engagement, except as required by law or authorized by you.

6. Termination

Either party may terminate this agreement at any time by providing [Number] days written notice. You will be responsible for fees incurred for work performed up to the date of termination.

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

Sincerely,

[Your Name/Firm Name]

[Your Title]

Accepted and Agreed:

Signature: _____

Name: [Client Name]

Date: _____