

[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Dear [Client Name],

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

Scope of Services

We will prepare your [Year] Federal and [State(s)] individual income tax returns from information you provide. We will not audit or verify the data you submit, although we may ask for clarification. It is your responsibility to provide all necessary information, including income, deductions, and credits.

Client Responsibilities

- You are responsible for the accuracy and completeness of the information provided.
- You must maintain documentation to support all items reported on your tax returns, such as receipts and logs for business expenses or charitable contributions.
- You are responsible for reviewing the returns before they are filed to ensure there are no omissions or errors.

Fees

Our fees for these services will be based on [the complexity of the returns / our standard hourly rates / a fixed fee of \$Amount]. Payment is due upon delivery of the completed tax returns.

Filing Deadlines

The deadline to file your return is [Date]. We must receive all your information by [Cut-off Date] to ensure timely completion. If information is provided late, we may need to file an extension on your behalf.

Audit Protection

Your returns may be selected for review by taxing authorities. In the event of an audit, we are available to represent you for an additional fee. This engagement does not include audit representation unless a separate agreement is signed.

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

Sincerely,

[Your Name/Firm Name]
[Your Title]

Accepted by:

Signature: _____ Date: _____

Print Name: [Client Name]