

[Date]

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

Dear [Client Contact Name],

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

## **Scope of Work**

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

- IRS Form 990 (or 990-EZ/990-N)
- [State Form Name, if applicable]
- [Any additional schedules or forms]

We will not audit or verify the information you provide. Our work does not include procedures to discover errors, fraud, or other irregularities.

## **Organization Responsibilities**

The Organization is responsible for:

- Providing all necessary financial records and information.
- Maintaining an internal control system.
- Ensuring compliance with laws and regulations.
- The accuracy and completeness of the representations made in the returns.

## **Professional Fees**

Our fee for these services will be \$[Amount] or based on our standard hourly rates. This fee is based on the expectation that your records are complete and organized. Additional fees may apply for unforeseen accounting work or consultations.

## **Public Inspection**

Please note that Form 990 is a public document. It must be made available for public inspection by the Organization. Certain schedules, such as the list of contributors (Schedule B), are generally not subject to public disclosure.

## **Record Retention**

It is your responsibility to retain all documents, canceled checks, and other data that form the basis of your income and disbursements. These may be necessary to prove the accuracy of the returns to a taxing authority.

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

Sincerely,

[Your Name/Firm Name]

[Your Title]

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**Approved by:**

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_