

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

## **Re: Engagement for Tax Controversy Representation**

Dear [Client Name],

This letter confirms that [Firm Name] ("the Firm") has been retained to represent you in connection with [describe specific tax matter, e.g., IRS audit of 2022 Form 1040 / State tax notice regarding sales tax].

### **Scope of Services**

The scope of our representation is limited to the following:

- Reviewing relevant financial records and tax returns.
- Communicating with taxing authorities on your behalf.
- Preparing protests, appeals, or supporting documentation.
- Representing you in meetings or hearings related to this specific matter.

This engagement does not include tax preparation, filing of new returns, or litigation in a court of law unless a separate agreement is signed.

### **Fees and Billing**

Our services will be billed based on [hourly rates / a flat fee of \$X]. You agree to pay an initial retainer of \$[Amount] before work commences. Invoices will be issued [monthly/periodically] and are due upon receipt.

### **Client Responsibilities**

You agree to provide all requested information and documents in a timely manner and to ensure that all information provided is complete and accurate to the best of your knowledge.

### **Confidentiality**

All communications related to this matter are subject to [Attorney-Client / Practitioner-Client] privilege to the extent provided by law.

### **Termination**

Either party may terminate this engagement at any time upon written notice. Upon termination, you remain responsible for all fees and costs incurred 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/Signature]  
[Your Title]  
[Firm Name]

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**Accepted and Agreed:**

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[Client Signature]

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