

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

This letter confirms the terms and objectives of our engagement for tax planning and advisory services. The purpose of this agreement is to outline the nature of the services we will provide and the responsibilities of both parties.

1. Scope of Services

We will provide the following tax planning and advisory services:

- Review of financial information for tax minimization opportunities.
- Strategic advice regarding [Specific Area, e.g., Federal/State income tax, Estate planning].
- Analysis of the tax consequences of proposed transactions.
- Periodic meetings to discuss legislative changes affecting your tax position.

2. Client Responsibilities

You are responsible for the following:

- Providing complete, accurate, and timely financial information and documentation.
- Disclosing all relevant facts and future plans that may impact tax liability.
- The final decision to implement any recommended tax strategies.

3. Professional Fees

Our fees for these services will be based on [Hourly Rate / Fixed Fee of \$XXX]. Expenses such as postage, filing fees, or specialized research software will be billed separately. Invoices are due upon receipt.

4. Limitations and Guarantees

Tax laws are subject to frequent change and differing interpretations by taxing authorities. While we provide advice based on our professional judgment, we cannot guarantee that a taxing authority will not challenge a position taken. This engagement does not include tax return preparation or audit representation unless specifically requested in writing.

5. Confidentiality

All information provided to us will be held in the strictest confidence and will not be disclosed to third parties without your prior written consent, except as required by law.

6. Term and Termination

This agreement remains in effect until the completion of the services or until terminated by either party with [Number] days' written notice.

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

Sincerely,

[Your Name/Firm Name]

[Title]

Accepted by:

Signature: _____

Date: _____