

[Date]

[Client Name]

[Client Address]

[City, Country, Postcode]

**Subject: Engagement for Expatriate Tax Services**

Dear [Client Name],

This letter confirms the terms and objectives of our engagement to provide expatriate tax services to you for the tax year ending [Year].

**1. Scope of Services**

We will provide the following services:

- Preparation of your federal and state individual income tax returns for [Country/State].
- Calculation of foreign tax credits and exclusions (e.g., Form 2555 or Form 1116).
- Preparation of Report of Foreign Bank and Financial Accounts (FBAR - FinCEN Form 114), if applicable.
- Consultation regarding tax residency status and treaty benefits.

**2. Client Responsibilities**

You are responsible for providing all necessary financial information, including income statements, foreign tax paid records, and details of foreign financial accounts. You certify that all information provided is accurate and complete to the best of your knowledge.

**3. Professional Fees**

Our fees for these services will be [Amount/Hourly Rate]. This fee does not include additional representation in the event of an audit by tax authorities. Payment is due upon [Terms, e.g., receipt of draft returns].

**4. Confidentiality**

We will maintain the confidentiality of your information in accordance with professional standards and applicable data protection laws.

**5. Limitation of Liability**

Our liability for any errors or omissions is limited to the amount of fees paid for the services rendered under this agreement.

If the terms of this letter are acceptable, please sign and return the enclosed copy.

Sincerely,

[Your Name/Firm Name]

[Title]

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**Acknowledgment:**

I agree to the terms and conditions set forth in this engagement letter.

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