

[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 [Year].

### **Scope of Services**

We will prepare your [Year] Federal and State 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**

- Provide accurate and complete documentation (W-2s, 1099s, receipts, etc.).
- Maintain records required by law to support the positions taken on the return.
- Review the final returns carefully before signing and filing.
- Inform us of any foreign financial accounts or assets.

### **Professional Fees**

Our fees for these services will be based on [the complexity of the return / our hourly rates / a flat fee of \$XXX]. Payment is due upon completion of the returns and prior to electronic filing.

### **Confidentiality and Documentation**

We will maintain the confidentiality of your information in accordance with professional standards. We will return your original records to you upon completion. You should retain these records for at least seven years.

### **Limitation of Liability**

Our liability for any professional errors or omissions is limited to the amount of fees paid for these services.

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

Sincerely,

[Firm Name]  
[Tax Professional Name]

---

**Acknowledgment:**

Accepted by:

\_\_\_\_\_  
[Client Signature]

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