

[Your Accounting Firm Name]
[Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Client Name]
[Business Name]
[Client Address]
[City, State, Zip Code]

Dear [Client Name],

This letter outlines the terms and objectives of our engagement to provide recurring bookkeeping services for [Business Name].

1. Scope of Services

We will perform the following services on a [Monthly/Quarterly] basis:

- Recording and classifying all bank and credit card transactions.
- Reconciliation of bank and credit card accounts.
- Preparation of monthly financial statements (Balance Sheet and Income Statement).
- [List any additional services, e.g., Accounts Payable, Sales Tax Filing].

2. Client Responsibilities

To perform these services, you agree to provide all necessary financial documentation (including bank statements, receipts, and invoices) by the [Day] of each month. We will not audit or verify the information you provide.

3. Fees and Billing

The fee for these recurring services is \$[Amount] per [Month/Quarter]. Invoices will be issued on the [Day] of each month and are due upon receipt. Any additional work outside of this scope will be billed at our standard hourly rate of \$[Rate].

4. Term and Termination

This agreement will remain in effect until terminated by either party with [30] days written notice.

Please sign below to indicate your acceptance of these terms.

Sincerely,

[Your Name/Firm Representative]
[Title]

Accepted by:

[Client Signature]

[Date]