

[Date]

[Client Name]

[Client Address]

[City, State, Zip]

Re: Ongoing Sales and Use Tax Compliance Services

Dear [Client Contact Name],

This letter confirms the terms and objectives of our engagement to provide ongoing sales and use tax compliance services to [Client Company Name] ("the Client") beginning [Start Date].

## **Scope of Services**

We will perform the following services based on information provided by you:

- Preparation of monthly, quarterly, and/or annual sales and use tax returns for the jurisdictions listed in Appendix A.
- Calculation of tax liabilities based on data exported from your accounting systems.
- Electronic filing of returns and coordination of tax payments.
- Maintenance of a compliance calendar to track filing deadlines.
- Brief responses to routine notices from taxing authorities regarding filed returns.

## **Client Responsibilities**

The Client is responsible for:

- The accuracy and completeness of all financial data provided to us.
- Timely delivery of data (by the [Day] of each month) to ensure filing deadlines are met.
- Final approval of all tax returns before submission.
- Notifying us of any changes in business activity, new locations, or changes in nexus.
- Payment of all taxes due to the respective jurisdictions.

## **Professional Fees**

Our fees for these services will be [Amount] per [Month/Quarter]. This fee does not include significant research, audit representation, or voluntary disclosure agreements, which will be billed separately at our standard hourly rates. Out-of-pocket expenses will be billed at cost.

## **Term and Termination**

This engagement will continue on a month-to-month basis. Either party may terminate this agreement with [Number] days' written notice. All fees for work performed up to the date of termination will be due immediately.

## **Limitation of Liability**

Our liability for any claim arising out of this engagement shall be limited to the total amount of fees paid for the services giving rise to the claim. We are not responsible for penalties or interest resulting from data delays or inaccuracies provided by the Client.

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

Sincerely,

[Your Name/Firm Name]

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### **Accepted by:**

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

Name: [Client Representative Name]

Title: \_\_\_\_\_

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