

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Quarterly Sales and Use Tax Compliance Services

Dear [Client Contact Name],

This letter confirms the terms and objectives of our engagement to provide sales and use tax compliance services to [Client Company Name] for the calendar year [Year].

Scope of Services

We will prepare the quarterly sales and use tax returns for the following jurisdictions:

- [List State/Local Jurisdictions]

Our services include:

- Reviewing summary sales and purchase data provided by you.
- Preparing the required quarterly tax returns based on that data.
- Submitting the returns to the appropriate taxing authorities via [Electronic Filing/Mail].
- Notifying you of the tax amounts due and the payment deadlines.

Client Responsibilities

You are responsible for the following:

- Providing complete and accurate sales and purchase records no later than [Number] days after the end of each quarter.
- Maintaining all supporting documentation required by tax authorities.
- The final review and approval of all tax returns before filing.
- Ensuring sufficient funds are available for tax payments.

Limitations

This engagement is limited to the preparation of the returns listed above. This engagement does not include tax nexus studies, audit representation, or retroactive voluntary disclosure agreements unless specifically requested and agreed upon in writing.

Fees

Our fee for these services will be [Amount] per quarter, plus any applicable out-of-pocket expenses. Invoices are due and payable upon receipt.

Term

This agreement will remain in effect for the [Year] tax year. Either party may terminate this agreement 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]

[Your Title]

Accepted by:

Signature: _____

Name: [Client Representative Name]

Date: _____