

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

## **RE: Engagement for Financial Hardship Tax Relief Services**

Dear [Client Name],

This letter confirms that [Firm Name] ("we" or "us") has been retained by [Client Name] ("you") to provide representation and assistance regarding your outstanding tax liabilities with the [IRS/State Tax Agency] for the tax years [List Years].

### **1. Scope of Services**

We will evaluate your financial situation to determine eligibility for tax relief programs. Depending on your qualifications, our services may include:

- Preparation and filing of an Offer in Compromise (OIC).
- Requesting "Currently Not Collectible" (CNC) status.
- Negotiating an Installment Agreement based on financial hardship.
- Requesting penalty abatement.

### **2. Fees and Payment**

You agree to pay a [Flat Fee/Hourly Rate] of \$[Amount] for these services. A retainer of \$[Amount] is due upon signing this letter. This fee does not include any government filing fees or costs associated with obtaining third-party records.

### **3. Client Responsibilities**

To perform these services, you must provide complete and accurate financial documentation, including bank statements, income verification, and expense records, by [Deadline Date]. Failure to provide documentation may result in the denial of your application by tax authorities.

### **4. No Guarantee of Outcome**

While we will advocate for the best possible resolution, we cannot guarantee that the [IRS/State Tax Agency] will accept a settlement offer or grant relief. Final approval rests solely with the taxing authority.

### **5. Termination**

Either party may terminate this engagement at any time upon written notice. You will be responsible for fees incurred up to the date of termination.

Please sign below to indicate your agreement with these terms.

Sincerely,

[Authorized Signature]  
[Firm Name]

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**Agreed and Accepted:**

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[Client Name]  
Date: \_\_\_\_\_