

[Your Name/Company Name]
[Address Line 1]
[Address Line 2]
[Phone Number]
[Email Address]

[Date]

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

Re: Engagement for Offer in Compromise (OIC) Preparation Services

Dear [Client Name],

Thank you for choosing [Your Company Name] to assist you with your tax resolution needs. This letter outlines the terms and scope of our services regarding the preparation and submission of an Offer in Compromise (OIC) to the [IRS/State Tax Agency].

1. Scope of Services

Our firm will perform the following services:

- Review of your financial documentation (income, assets, and expenses).
- Analysis of your eligibility for the OIC program based on Doubt as to Collectibility.
- Preparation of Form 656 (Offer in Compromise) and Form 433-A/B (Collection Information Statement).
- Submission of the completed application package to the taxing authority.
- Ongoing communication with the tax agency regarding the status of your application.

2. Client Responsibilities

To ensure an accurate and timely filing, you agree to:

- Provide all requested financial records, bank statements, and tax documents within [Number] days.
- Ensure all information provided is true, correct, and complete.
- Remain compliant with all current tax filing and payment requirements during the OIC process.

3. Fees and Costs

The fee for these services is [Insert Amount/Hourly Rate]. This fee does not include the [IRS/State] application fee or the initial non-refundable down payment required by the tax agency, which must be paid directly to the taxing authority by the client.

4. No Guarantee of Results

While we will use our best professional efforts to achieve a favorable outcome, you acknowledge

that the final decision rests solely with the taxing authority. We cannot guarantee that your Offer in Compromise will be accepted.

Please sign below to indicate your acceptance of these terms.

Sincerely,

[Your Signature]

[Your Printed Name]

Client Acceptance:

Signature: _____ Date: _____