

**Date:** [Insert Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

## **Re: Engagement for Offer in Compromise (OIC) Services**

Dear [Client Name],

This letter confirms that [Firm Name] ("we" or "us") has been retained by [Client Name] ("you") to provide representation regarding an Offer in Compromise (OIC) with the [Internal Revenue Service / State Taxing Authority] for the tax years [List Years].

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

We will perform the following services:

- Review of financial documentation provided by you.
- Evaluation of your eligibility for an OIC.
- Preparation of Form 656 (Offer in Compromise) and Form 433-A/B (Collection Information Statement).
- Submission of the offer package to the taxing authority.
- Negotiation with the tax examiner regarding the offer terms.

### **2. Client Responsibilities**

You agree to provide complete, accurate, and timely information. This includes bank statements, pay stubs, asset valuations, and tax filing history. You must remain current on all tax filing and payment obligations during this process.

### **3. Fees and Costs**

The fee for these services is [Fixed Amount / Hourly Rate]. A retainer of [Amount] is required before work begins. This fee does not include the [Amount] IRS application fee or the initial offer payment, which are your direct responsibility.

### **4. No Guarantee of Results**

While we will provide diligent representation, we cannot guarantee that the taxing authority will accept your Offer in Compromise. The final decision rests solely with the [IRS / State Authority].

### **5. Termination**

Either party may terminate this agreement at any time by providing written notice. In the event of termination, you will be responsible for fees earned up to the date of termination.

Please sign below to indicate your acceptance of these terms.

Sincerely,

[Your Name/Signature]  
[Firm Name]

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**Accepted and Agreed:**

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[Client Name]

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