

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Engagement for Tax Agency Settlement Advisory Services

Dear [Client Name],

This letter confirms the terms and objective of our engagement to provide tax settlement advisory services to you regarding your tax liabilities with the [Name of Tax Agency, e.g., IRS].

1. Scope of Services

We will evaluate your financial situation to determine eligibility for tax resolution programs. Our services include:

- Reviewing tax notices and financial documentation.
- Preparing and submitting settlement proposals (such as Offers in Compromise or Installment Agreements).
- Representing you in communications and negotiations with the [Name of Tax Agency].

2. Client Responsibilities

You agree to provide full and accurate disclosure of all financial information, including income, assets, and expenses. Timely delivery of requested documents is essential for meeting agency deadlines.

3. Fees and Payment

Our fee for these services will be [Amount/Hourly Rate]. A retainer of [Retainer Amount] is required before work begins. Additional costs, such as agency filing fees, are the responsibility of the client.

4. No Guarantee of Outcome

While we will advocate for the most favorable settlement possible, the final decision rests solely with the tax agency. We cannot guarantee that a settlement will be accepted or that your tax liability will be reduced.

5. Termination

Either party may terminate this agreement at any time by providing written notice. You will be responsible for fees incurred for work performed up to the date of termination.

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

Sincerely,

[Your Name/Firm Name]
[Your Title]

Acknowledgment and Acceptance:

Signature: _____ Date: _____