

TAX DEBT SETTLEMENT SERVICES ENGAGEMENT LETTER

Date: [Insert Date]

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

Dear [Client Name],

This letter confirms the terms upon which [Company Name] ("we" or "us") will provide tax debt settlement services to [Client Name] ("you").

1. Scope of Services

We will represent you before the [IRS/State Tax Authority] regarding your tax liabilities for the following tax years: [List Years]. Our services include:

- Evaluating your financial situation to determine eligibility for settlement programs.
- Preparing and filing an Offer in Compromise (OIC) or Installment Agreement.
- Communicating with tax authorities on your behalf.
- Negotiating terms of settlement or payment plans.

2. Fees and Payment

You agree to pay a total fee of \$[Amount] for these services. The payment schedule is as follows:

- Retainer/Initial Deposit: \$[Amount] due upon signing.
- Remaining Balance: Paid in installments of \$[Amount] per month.

Please note that government filing fees are not included in our professional fees and must be paid separately by you.

3. Client Responsibilities

You agree to provide accurate and complete financial documentation, including bank statements, pay stubs, and tax returns, within [Number] days of our request. Failure to provide documentation may result in the termination of this agreement.

4. No Guarantee of Outcome

While we will use our best efforts to achieve a favorable settlement, you acknowledge that the [IRS/State Tax Authority] has the final authority to accept or reject any offer. We make no guarantee regarding the final outcome or the amount of tax reduction.

5. Termination

Either party may terminate this agreement at any time upon written notice. If terminated, you will be responsible for fees for work performed up to the date of termination.

Please sign below to indicate your acceptance of these terms.

Sincerely,

[Authorized Signature]

[Company Name]



Client Acceptance:

Signature: _____

Date: _____