

[Date]

[Officer Name]
[Title]
[Organization Name]
[Address]
[City, State, Zip]

Dear [Officer Name],

This letter confirms the terms of our engagement to prepare the financial statements and required tax filings for [Organization Name] for the period ending [Date].

Our Responsibilities

We will prepare the financial statements of [Organization Name] based on the information you provide. We will not audit or review these statements. Our objective is to assist management in presenting financial information without undertaking to obtain or provide any assurance that there are no material modifications that should be made to the financial statements.

We will also prepare the following tax returns:

- Form 990 (Return of Organization Exempt From Income Tax)
- [List other state or local forms if applicable]

Management's Responsibilities

The engagement is based on the understanding that management acknowledges and understands their responsibility for:

- The preparation and fair presentation of financial statements.
- Internal controls relevant to the preparation of financial statements.
- The accuracy and completeness of the records and information provided to us.
- Ensuring the organization complies with the laws and regulations applicable to its activities.

Fees and Timeline

Our fee for these services is estimated to be \$[Amount]. This fee is based on the assumption that your records are in good order. If additional time is required due to unforeseen circumstances, we will discuss this with you before proceeding.

We expect to begin our work on [Start Date] and complete the filings by [Target Completion Date], provided all information is received in a timely manner.

Signatures

Please sign and return the attached copy of this letter to indicate your acknowledgment of, and agreement with, the arrangements for our preparation of your financial statements and tax returns.

Sincerely,

[Your Name/Firm Name]

Acknowledged and agreed on behalf of [Organization Name] by:

Signature: _____

Name: _____

Date: _____