

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Tax Preparation Engagement Letter

Dear [Client Name],

This letter confirms the terms of our engagement and the nature of the services we will provide for the tax year [Year].

Scope of Services

We will prepare your [Federal/State/Local] income tax returns based on the information you provide. We will not audit or verify the data you submit, although we may ask for clarification if the information appears incomplete or inconsistent.

Client Responsibilities

You are responsible for the following:

- Providing all necessary information, including income, deductions, and credits, in a timely manner.
- Maintaining all documentation, receipts, and canceled checks required by tax authorities to support the information reported.
- Reviewing the final returns for accuracy before they are filed.

Fees

Our fees for these services will be based on [Flat Fee / Hourly Rate]. Payment is due upon completion of the returns and prior to electronic filing.

Confidentiality

We will maintain the confidentiality of your information in accordance with professional standards and applicable law.

Limitation of Liability

Our liability for any professional error is limited to the amount of the fees paid for this engagement.

If the terms described above are acceptable, please sign and return a copy of this letter.

Sincerely,

[Firm Name]

[Preparer Name/Signature]

Acknowledgment:

Accepted by:

[Client Signature]

Date: _____