

[Date]

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

Dear [Client Name],

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. For the 20[XX] tax year, we will prepare your [Federal/State] individual income tax returns from information you furnish us.

Our Responsibilities

We will prepare your tax returns based on the information you provide. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. Our work in connection with the preparation of your tax returns does not include any procedures designed to discover fraud, theft, or other irregularities.

Client Responsibilities

You acknowledge that you are responsible for the proper recording of financial activities, the safeguarding of assets, and the substantial accuracy of your financial records. You are responsible for providing all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority.

Professional Fees

Our fees for these services will be based upon the complexity of the returns and the time required to complete them. All invoices are due and payable upon presentation.

Signatures

If the above fairly sets forth your understanding, please sign this letter and return it to us.

Sincerely,

[Firm Name]

Accepted by:

[Client Signature]

[Date]