

# Tax Planning Assistance Agreement

Date: \_\_\_\_\_

Client Name: \_\_\_\_\_

Client Address: \_\_\_\_\_

Dear [Client Name],

This letter is to confirm our agreement regarding the tax planning assistance services I will provide. The objective of this agreement is to ensure clarity on the services to be rendered, fees, and other relevant terms.

## Services Provided

I will provide the following services:

- Review of current tax situation
- Identification of tax-saving opportunities
- Preparation of tax strategies
- Consultation and support throughout the tax year

## Fees

The fee for these services will be: \$\_\_\_\_\_. Payment is due upon completion of the services.

## Confidentiality

All personal and financial information provided will remain confidential and will only be used for the purpose of providing tax planning assistance.

## Agreement

By signing below, you agree to the terms outlined in this letter.

\_\_\_\_\_

Client Signature

\_\_\_\_\_

Provider Signature

Thank you for choosing my services. I look forward to working with you.

Sincerely,

[Your Name]

[Your Title/Position]

[Your Contact Information]