

Engagement Letter for Tax Return Preparation

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to confirm our engagement to provide tax return preparation services for the tax year [Insert Year]. This letter outlines the terms of our engagement and our respective responsibilities.

Scope of Services

We will prepare your federal and state income tax returns based on the information you provide. Our services will include:

- Gathering and reviewing necessary financial documents.
- Preparing and filing your tax returns.
- Advising on tax-related matters as they arise.

Client Responsibilities

To facilitate the preparation of your tax returns, you agree to:

- Provide all necessary documentation in a timely manner.
- Ensure that the information provided is accurate and complete.
- Be available for any questions and discussions related to your tax returns.

Fees and Payment Terms

Our fees for this engagement will be based on the time spent and the complexity of the work performed. An estimate of fees will be provided for your approval before work begins. Payment is due upon completion of the tax return.

Confidentiality

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

If you agree to the terms of this engagement, please sign and return a copy of this letter.

Sincerely,

[Your Name]

[Your Firm's Name]

[Your Firm's Address]

[City, State, Zip Code]

Agreed to by:

[Client's Signature] Date: _____