

Service Engagement Letter

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to confirm our understanding of the services we will provide to you in connection with your tax compliance for the tax year [Insert Tax Year]. This letter outlines the scope of our services, the responsibilities of both parties, and the terms of our engagement.

Scope of Services

We will provide the following services:

- Gathering and analyzing financial data
- Preparing and filing federal and state tax returns
- Advising on tax planning strategies
- Responding to any inquiries from tax authorities

Responsibilities

Your responsibilities include providing us with accurate and complete information, including any documents that may affect your tax situation. Timely communication is essential to ensure compliance with filing deadlines.

Engagement Terms

The fee for our services will be based on the complexity of your tax situation and will be agreed upon prior to commencement. Invoices are due upon receipt.

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

Thank you for choosing our services. We look forward to working with you.

Sincerely,

[Your Name]

[Your Company]

[Your Address]

[City, State, Zip Code]

[Your Contact Information]

Acceptance

Agreed and Accepted by:

[Client's Name]

Date: _____