

Letter of Engagement: Tailored Tax Strategy Discussion

Date: [Insert Date]

To: [Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to confirm our engagement to discuss and develop a tailored tax strategy that aligns with your financial goals. During this discussion, we aim to:

- Assess your current tax situation
- Identify opportunities for tax savings
- Discuss potential investments and strategies
- Provide guidance on new tax laws and regulations

We recommend scheduling our meeting for [Insert Suggested Date and Time]. Please let us know if this works for you or if you would prefer an alternate time.

We look forward to collaborating with you on this important aspect of your financial strategy.

Best regards,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]