

TAX ENGAGEMENT LETTER

Client Name:

Firm Name:

Engagement Overview:

This letter confirms the terms of our engagement to provide professional tax services to you. We will prepare your federal and state income tax returns as agreed based on information you provide. Our services do not include audit representation except as separately agreed.

Client Responsibilities:

You agree to provide complete and accurate information necessary for the preparation of your tax returns. You acknowledge responsibility for the accuracy and completeness of all information provided. You agree to retain all necessary documents, records, and receipts in support of your tax returns.

Scope of Services:

Our engagement is limited to preparation of the tax returns specified above. We will not audit or verify the data you submit, although we may ask for clarification as needed. We will provide advice based only on information supplied by you and applicable tax laws and regulations.

Fees and Payment Terms:

Our fees for services rendered will be based on the complexity and time required. An estimate will be provided upon request. Payment is due upon presentation of our invoice. Unpaid balances may accrue interest and result in suspension of services.

Confidentiality:

We will maintain the confidentiality of your personal and financial information in accordance with professional standards and applicable laws. We will not disclose any information to third parties without your consent except as required by law.

Limitations of Liability:

Our liability for any claim arising from this engagement shall be limited to the amount of fees paid for the services. We shall not be liable for any consequential, incidental, or punitive damages.

Termination of Engagement:

Either party may terminate this engagement upon written notice. You will be responsible for payment of fees for services performed through the date of termination.

Dispute Resolution:

Any dispute arising from this engagement shall be resolved by binding arbitration conducted in accordance with the rules of the American Arbitration Association in the state where the services were performed.

Governing Law:

This engagement letter shall be governed by and construed in accordance with the laws of the state of _____ without regard to conflict of laws principles.

Acknowledgment and Acceptance:

Please sign below to acknowledge your agreement to the terms outlined in this letter and return a signed copy to us. Your signature constitutes acceptance of this engagement and its terms.

CLIENT SIGNATURE

FIRM REPRESENTATIVE SIGNATURE

Signature: _____

Signature: _____

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