

YEAR-END TAX COMPLIANCE ENGAGEMENT LETTER

Date: _____

Client Name: _____

Address: _____

Tax Year: _____

Dear _____,

This letter confirms the terms of our engagement and clarifies the nature and extent of the tax compliance services we will provide for the tax year ending _____.

1. SCOPE OF SERVICES

We will prepare the following tax returns for the year specified above:

- Federal Income Tax Return Form _____
- State Income Tax Return(s) for: _____
- Local Income Tax Return(s) for: _____

We will not prepare any other tax returns, including but not limited to sales, use, property, or employment tax returns, unless specifically requested and agreed to in writing as an addendum to this agreement.

2. CLIENT RESPONSIBILITIES

You are responsible for providing all necessary, accurate, and complete financial information required for the preparation of the tax returns. This includes, but is not limited to, bookkeeping records, bank statements, receipts, 1099s, W-2s, and any other relevant documentation. You represent that the information you provide will be accurate and complete to the best of your knowledge.

We will not audit or otherwise verify the information you submit, although we may ask for clarification if the information appears inconsistent or incomplete.

3. PROFESSIONAL FEES

Our fees for these services will be based on _____.

An initial retainer of \$_____ is required before work commences. The remaining balance will be due upon completion of the returns and prior to electronic filing or delivery of the physical returns.

4. TERM AND TERMINATION

This agreement will terminate upon completion of the filing of the designated tax returns for the specified tax year, unless terminated earlier by either party with written notice.

5. ACCEPTANCE OF TERMS

Please review this letter carefully. If the terms are acceptable and consistent with your understanding of our agreement, please sign, date, and return a copy of this letter to us.

Prepared & Approved By (Tax Firm Representative):

Authorized Signature

Print Name & Title

Date

Accepted & Agreed By (Client):

Client Signature

Print Name & Title (if applicable)

Date