

Engagement Letter

Preparer: [Preparer name] **Client:** [Client name] **Date:** [Date]

This letter confirms the terms of the engagement between Preparer and Client and the nature and limits of the services Preparer will provide.

1. Services Covered

Preparer will provide the following services: [describe services — e.g., "monthly bookkeeping, bank and credit card reconciliation, and preparation of monthly financial statements," or "preparation of Client's [year] individual/business tax return(s)"]. Services not listed here, including [examples — e.g., "audit or review-level assurance, tax planning beyond return preparation, or representation before a taxing authority"], are outside this engagement unless added in writing.

2. Engagement Period

[If ongoing: "This engagement begins on the date above and continues month to month until either party ends it as described in Section 6." If seasonal/one-time: "This engagement covers the [tax year/period] and ends once the applicable return(s) or deliverable(s) are filed or delivered."]

3. Client Responsibilities

Client will provide complete and accurate records, receipts, and information needed to perform the services above, by [deadline or "a reasonable time before any filing deadline"]. Preparer is not responsible for errors or omissions resulting from incomplete or inaccurate information Client provides.

4. Fees & Payment

Fee: [amount and basis — e.g., "\$400/month, billed in advance" or "\$600 flat fee for the return described above, due upon completion"]. [Note any retainer, late-payment fee, or additional-hours rate — otherwise delete this line.]

5. No Assurance; Reliance on Client Information

These services do not constitute an audit, review, or examination under any professional assurance standard, and no opinion or other form of assurance is provided. Preparer will rely on the accuracy and completeness of the information and records Client provides without independently verifying them, unless stated otherwise above.

6. Term & Termination

Either party may end this engagement with [Number, e.g., 15] days' written notice. Client remains responsible for fees for services performed through the effective date of termination.

7. Confidentiality

Preparer will keep Client's financial information confidential, except as required by law or to the extent needed to perform the services above.

8. Governing Law

This agreement is governed by the laws of the State of [State].

Signatures

By signing below, each party agrees to these terms.

[Preparer name] ("Preparer")

Signature: _____ Printed name: _____ Date: _____

[Client name] ("Client")

Signature: _____ Printed name: _____ Date: _____

This template is a general starting point, not legal advice — customize it and have it reviewed for your situation.