

CPA ENGAGEMENT LETTER

Firm Name: _____ Client Name: _____

Firm Address: _____

Client Address: _____

Phone: _____ Email: _____

This engagement letter outlines the terms and objectives of the professional services to be provided by the CPA firm (the “Firm”) to the client (the “Client”). Please review this letter carefully, as it describes the scope of our services, responsibilities, and other important terms governing our engagement.

1. Objective and Scope of Services

The Firm will perform accounting, tax, and consulting services as mutually agreed. These services may include preparation of financial statements, tax returns, and related schedules, as well as advisory services. The Firm will not audit or review the Client’s financial statements unless expressly agreed in writing.

2. Client Responsibilities

The Client agrees to provide the Firm with complete and accurate information necessary for the engagement, including access to all relevant records, documents, and personnel. The Client is responsible for the accuracy and completeness of all information provided.

3. Firm Responsibilities

The Firm will perform services in accordance with professional standards established by the American Institute of Certified Public Accountants (AICPA) and applicable laws and regulations. The Firm will exercise professional judgment in all matters.

4. Confidentiality

The Firm will maintain the confidentiality of the Client’s information in accordance with professional standards and legal requirements. Information will not be disclosed to third parties without the Client’s consent except as required by law or professional obligations.

5. Fees and Payment Terms

Fees for services will be based on time spent by professionals at standard hourly rates, plus out-of-pocket expenses. The Firm will provide estimates of fees when requested but actual fees may vary. Invoices are due upon receipt, and the Firm reserves the right to suspend services for overdue accounts.

6. Termination

Either party may terminate this engagement upon written notice. The Client will be responsible for payment of all services rendered and expenses incurred up to the date of termination.

7. Limitation of Liability

The Firm's liability for any claim, loss, or damages arising out of this engagement is limited to the amount of fees paid for the services. The Firm shall not be liable for consequential, incidental, or punitive damages.

8. Governing Law

This engagement letter shall be governed by and construed in accordance with the laws of the United States and the applicable state law where the Firm is located, without regard to conflict of law principles.

9. Dispute Resolution

Any disputes arising under or related to this engagement shall be resolved through negotiation between the parties. If unresolved, disputes may be submitted to mediation or binding arbitration as mutually agreed.

10. Entire Agreement

This letter constitutes the entire agreement regarding the engagement and supersedes all prior communications, whether oral or written. Any amendments must be in writing and signed by both parties.

11. Electronic Delivery and Signatures

This engagement letter may be executed and delivered by electronic means, including PDF and electronic signature, which shall be deemed as valid as original signatures.

12. Client Acknowledgment and Acceptance

By signing below, the Client acknowledges having read, understood, and agreed to the terms outlined in this engagement letter and authorizes the Firm to proceed with the services described herein.

CLIENT SIGNATURE

Signature: _____

Name: _____

Title: _____

CPA FIRM SIGNATURE

Signature: _____

Name: _____

Title: _____

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