

# TAX PREPARATION ENGAGEMENT LETTER

Client Name:

Client ID:

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## **Introduction:**

This letter confirms the terms of our engagement and the nature and limitations of the services we will provide. We will prepare your federal and applicable state and local income tax returns for the tax year specified by you. Our services are limited to the tax preparation and do not include any other services unless explicitly agreed upon.

## **Our Responsibilities:**

We will prepare your tax returns based on information you provide. We will not audit or verify the data you submit, although we may ask for clarification of some information. We will use professional judgment in resolving questions where the tax law is unclear, but we will not be responsible for disallowance of doubtful deductions or questionable entries. We will file the completed returns electronically unless otherwise instructed.

## **Client's Responsibilities:**

You agree to provide complete and accurate information necessary for the preparation of your tax returns. You understand that the accuracy of the returns depends on the information you provide and that you are responsible for maintaining records to substantiate the information supplied. You should retain all documents, canceled checks, and other data that form the basis of income and deductions.

## **Confidentiality:**

All information you provide to us will be kept confidential, except as required by law or as authorized by you. We will discuss your tax matters only with you or your authorized representatives.

## **Fees and Payment:**

Our fees for tax preparation services will be based on the complexity of the work and the time required. An estimate will be provided upon request. Payment is due upon delivery of completed tax returns. Additional services not covered by this engagement letter will be billed separately.

## **Limitations and Disclaimers:**

We will prepare your tax returns in accordance with applicable federal, state, and local tax laws. Our engagement does not include any procedures to detect fraud, illegal acts, or errors beyond what is required for tax preparation. We assume no responsibility for any penalties or interest resulting from incomplete or inaccurate information provided by you.

## **Electronic Filing:**

We will electronically file your tax returns unless you instruct us otherwise. You understand that the IRS or state tax authorities may reject the electronic filing, in which case we will inform you and discuss alternative filing methods.

## **Record Retention:**

We will retain copies of your tax returns and workpapers for seven years, after which they may be destroyed unless you instruct us otherwise.

**Dispute Resolution:**

Any dispute related to this engagement shall be resolved through mediation prior to pursuing any other legal remedies. This engagement shall be governed by the laws of the United States and the state in which our office is located, without regard to conflict of law rules.

**Termination:**

Either party may terminate this engagement at any time by written notice. Upon termination, all fees and expenses incurred through the date of termination will be due and payable.

**Acceptance:**

Your signature below constitutes acknowledgment and agreement to the terms of this engagement letter.

**CLIENT SIGNATURE**

**PREPARER SIGNATURE**

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

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