

Client Letter of Engagement

TAX YEAR 2026 | 2027 FILING SEASON | DRAFT FOR REVIEW

Client name: _____ Date: _____

We agree to prepare the federal and agreed state income tax returns for tax year 2026 using information you provide. You are responsible for complete and accurate records, reporting all income, reviewing the return and approving filing. Preparation does not include audit representation or other services unless separately agreed. No refund or processing date is guaranteed. Fees depend on the agreed scope; a retainer may be discussed before work begins. A $150 cancellation fee applies after signing the fee acknowledgment, subject to applicable law and agreed terms. Additional return copies are $50 per tax year, subject to applicable rights. Your initial return copy will be provided as required. Separate filing authorization is required.

Federal/state returns and agreed scope

Excluded services or special arrangements

Estimated fee and retainer arrangement

Client questions or exceptions

Client signature: _____ Date: _____

Spouse signature (if applicable): _____ Date: _____