

Tax Audit Engagement Letter

June 6, 2024

Client Name

Client Address

City, State ZIP Code

Dear [Client Name],

This letter confirms our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide. You have engaged us to represent you regarding the audit of your tax returns for the year(s) ending [Insert Tax Years] by [Tax Authority, e.g., IRS/State Agency].

Scope of Services

Our services will consist of assisting you in gathering and preparing information required by the tax authorities, representing you in communications or meetings with the tax authority, and providing advice regarding the audit process. We will not audit or verify the data you provide but will rely on the information you submit to us.

Our Responsibilities

- Analyze and review all relevant tax documentation and correspondence.
- Assist in preparing responses to tax authority inquiries.
- Attend audit meetings or conferences as required.
- Keep you informed about significant developments during the audit process.

Your Responsibilities

- Provide all requested records and documents in a timely manner.
- Ensure the accuracy and completeness of information supplied to us.
- Respond promptly to our requests for additional information or clarification.

Fees and Billing

Our fees for this engagement will be based on the time spent on your behalf, billed at our standard hourly rates. Invoices are payable upon receipt.

Confidentiality

All information you provide will be maintained in strict confidence, except as required by law or with your written consent.

Agreement

If you agree to the terms described above, please sign and return a copy of this letter to indicate your acceptance. We look forward to assisting you in this matter.

Sincerely,

[Your Name]

[Your Firm Name]

Accepted and Agreed:

[Client Name or Representative]

Date: _____

Important Notes:

- This engagement letter outlines the scope and limitations of services.
- Clear documentation and communication are essential for a successful audit defense.
- Legal or tax outcomes are not guaranteed by the auditor or firm.
- Clients should retain a signed copy for their records.
- Any changes to terms or services must be documented in writing.