Stage 1 EXAM Engagement Letter

[Date]

[Client's Name]

[Client's Address]

[City, State, Zip]

Subject: Preliminary Review of Tax Situation for 2020 and 2021

Dear [Client's Name],

I am writing to outline the professional tax services we propose to provide. This letter serves as an agreement between you and [Your Name or Your Firm's Name] for the purpose of conducting a comprehensive review of your tax situation for the years 2020 and 2021.

**Services:**

The scope of this initial engagement will be to conduct a thorough review of your tax situation for the aforementioned years. This process involves the analysis of your tax returns, supporting documents, and any other relevant information that may contribute to understanding the intricacies of your case.

It is important to note that this agreement does not extend to representation before the Internal Revenue Service (IRS). Should it be determined, upon completion of the review, that representation is necessary, and we agree to represent you, a separate engagement letter detailing the scope and terms of the representation, including associated fees, will be prepared and sent to you.

**Fees:**

For this preliminary review, a fee of $X,000 is required, to be paid in advance. This covers the comprehensive assessment of your tax situation, including time spent on analyses and consultations.

**Documentation:**

You agree to provide, in a timely manner, any documentation or information we request for the purpose of this review. This includes, but is not limited to, tax returns, invoices, receipts, bank statements, or any other relevant financial documents. Your cooperation is crucial to facilitate an effective and efficient review process.

Please sign and return the enclosed copy of this letter to confirm your understanding and agreement of these terms. This offer must be accepted within 5 business days and the agreement, if accepted, will remain in effect unless terminated in writing.

If the above correctly sets forth your understanding, please sign this letter in the space indicated and return it to me.

Thank you for your attention to this matter. I look forward to serving you.

Sincerely,

[Your Name] [Your Title]

Acknowledged and Agreed:

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Client Signature and Date