Stage 2 EXAM Engagement Letter

[Date]

[Client's Name]

[Client's Address]

[City, State, Zip]

Dear [Client's Name],

Subject: Tax Audit Representation Engagement for 2020 and 2021

Following our comprehensive review of your tax situation for the years 2020 and 2021, we are pleased to offer you my professional services to represent you before the Internal Revenue Service (IRS). This letter serves as the engagement agreement for this purpose, defining the scope of our representation, the associated fees, and other pertinent details.

**Services:**

We will represent you before the IRS, communicating directly with Revenue Agent Lucretia or her Group Manager on your behalf. This engagement encompasses in-person meetings, telephone calls, and written correspondence as necessary. Our role will be to analyze the issues under audit, prepare thorough responses to IRS inquiries, negotiate on your behalf, and generally seek a resolution to the matter.

**Fees:**

For this initial level of representation, an estimated fee of $N,n00 will be charged. This covers all the services mentioned above.

**Communications:**

We will meet, correspond, and communicate with the [IRS Revenue Agent/TCO/etc.] on your behalf. Absent a summons, you will not be required to meet with the IRS personally.

You agree to have all communication with the IRS conducted by us, with us present, or with our advance approval. Contacting IRS directly may cause us to withdraw our representation without further notice.

**Possible Appeal:**

If it becomes necessary to appeal the audit findings to the IRS Independent Office of Appeals, we are prepared to extend our representation to cover this process. If such an extension is required, an additional fee of $N,n00 will apply.

Please sign and return the enclosed copy of this letter to confirm that you understand and agree to these terms. This offer of services is valid for 5 business days and, if accepted, the agreement will remain in effect unless terminated in writing.

Thank you for entrusting me with this responsibility. I am committed to providing you with the best possible representation in your dealings with the IRS.

Sincerely,

[Your Name] [Your Title]

Acknowledged and Agreed:

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[Client's Name] [Date]