Stage 1 COLLECTION Engagement Letter

[Date]

[Client's Name]

[Client's Address]

[City, State, Zip]

Subject: Preliminary Review of Tax Collection Matter 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 collection issues for the years 2020 and 2021.

**Services:**

The scope of this initial engagement will be to conduct a review of your tax collection matters situation for the years 2020 and 2021. This process involves filing Form 8821 (Tax Information Authorization), analysis of your tax filing compliance, IRS transcripts, tax payment history, documents you provide, IRS Notices and Letters, and any other relevant information that may contribute to understanding the particulars 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 along with IRS Form 2848 (Power of Attorney).

**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 us.

Sincerely,

[Your Name] [Your Title]

Acknowledged and Agreed:

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Client Signature and Date