

[Month Day, Year]

[First Last Name]

[Spouse First Last Name]

[City, State ZipCode]

[email@address]



Dear [Title LastName],

You have requested our firm's Advocacy Service. We will represent you before the Internal Revenue Service and State authorities. We will provide you with access to all official notices and correspondence.

We may be required by law to submit certain documents electronically. If we cannot submit documents electronically, or you request a waiver from the electronic documents, we will require your approval and signature on various documents. In these cases, we will supply you with paper copies and envelopes to send to the appropriate Federal and State agencies.

For our representation, you will be charged based on the fee schedule published on our website. Unless other arrangements are made in advance, we will require payment of a retainer before we initiate your case. The retainer will be used to offset your final bill. With your signature below, you agree to pay for our time and expenses in addition to any expenses paid on your behalf.

We will represent you and your return(s) based on information provided by you. By your signature, you agree to provide all requested documents. You further agree to answer all questions truthfully and fully so we can accurately represent you before Federal and State authorities.

Representation of your tax return(s) does not imply any verification or other assurances related to the information you provide; and we will not perform any auditing functions related to this engagement. You hereby acknowledge that it is your responsibility to provide all documentation and verification of items on your return(s) in the case of an audit or other inquiry from a government agency. Please note: some items, such as auto expenses, travel expenses, and certain charitable contributions, require contemporaneous written records to allow a tax deduction.

The information you provide us will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. If, at any time, you feel it may be appropriate, we advise you to consult with a tax attorney.

This agreement covers only your representation. It does not apply to services related to an audit by a government agency, additional correspondence with a government agency about other tax matters or other services, such as appeals, that may be required. If additional services are required, a separate agreement will be required.

We (I) have read and agree to the terms of this agreement:

_____ dated _____
[First Last Name]

_____ dated _____
[Spouse First Last Name]

_____ dated _____
Dana W. Jensen, EA
Woodlands Tax Advisors