

[Month Day, Year]

[First Last Name]
[Spouse First Last Name]
[City, State ZipCode]
[email@address]



Dear [Title LastName],

You have requested our firm's Advisory Service. We can advise you on your former, current and/or future tax concerns. In doing so, we will review recent tax returns and discuss with you your current-year tax-related activity. Based on your disclosures and our discussions, we will formulate recommendations specific to your circumstances and concerns. We will also provide you with a written copy of our assessment and recommendations.

In most cases, we will submit our documents electronically. If we cannot submit documents electronically, or you request a waiver from electronic documents, we will require your written approval and signature on various documents. In this case, we would supply you with paper copies and envelopes related to our deliverables.

For advisory services, you will be charged based on the fee schedule published on our website. Unless other arrangements are made in advance, we will request payment of a retainer when we initiate your engagement. The retainer will be used to offset our fees and expenses with any balance due upon completion of our work.

We will advise you and any designated representative(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 adequately address your tax concerns. Our tax advice does not imply any verification or other assurances related to the information you provide. We will not perform any audit or examination functions related to this engagement. You hereby acknowledge that it is your responsibility to provide all pertinent information and documentation.

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

This agreement covers only our advisory services related to the current tax year. It does not apply to tax accounting services, nor does it relate to representing you before the IRS in an audit by a government agency. Additional correspondence with a government agency about other tax matter(s) or other services, such as appeals, may be required. For these additional services, a separate engagement 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