

## Estate Tax Return Engagement Letter

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address:

\_\_\_\_\_  
\_\_\_\_\_

Subject: Preparation of \_\_\_\_\_ (year) Tax Returns of Entity Name:

\_\_\_\_\_

Thank you for choosing NW Tax & Accounting LLC to assist you with the \_\_\_\_\_ (year) taxes of \_\_\_\_\_ (Entity Name). This letter confirms the terms of our engagement and outlines the nature and extent of the services we will provide.

We will prepare \_\_\_\_\_ (year) federal and state income tax returns for of \_\_\_\_\_ (Entity Name). We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will start at \$5,600 plus any out-of-pocket expenses. Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

We will return the original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers from your engagement for up to seven years, after which these documents will be destroyed.

If you have not selected to e-file the returns with our office, you will be solely responsible for filing the returns with the appropriate taxing authorities. You should review all tax-return documents carefully before signing them. Our engagement to prepare your \_\_\_\_\_ (year) tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of the tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.

Thank you for the opportunity to be of service. For further assistance with your tax return needs, contact our office at (541) 738-4313.

Sincerely,

NW Tax & Accounting LLC

Accepted By:

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Fiduciary or Officer Representing Fiduciary Signature

Date: \_\_\_\_\_