

**Prompt:**

Create a client engagement letter for a tax preparation firm to send to new clients.

**ChatGPT's response:**

[Your Tax Preparation Firm] [Address] [City, State ZIP Code] [Phone Number] [Date]

[Client Name] [Client Address] [City, State ZIP Code]

Re: Engagement Letter for Tax Preparation Services

Dear [Client Name],

We are pleased to welcome you as a new client of [Your Tax Preparation Firm] for your tax preparation needs. We are excited to have the opportunity to serve you and provide you with the highest level of professional tax services.

As part of our engagement, we will be preparing your [tax year] tax return(s) in accordance with the tax laws and regulations applicable to your specific situation. Our services will include reviewing the information you provide to us and preparing your tax return(s) based on that information. We will also provide tax planning advice and recommendations to help you minimize your tax liability and maximize your tax savings.

In order for us to provide the best possible service, we request that you provide us with all relevant tax documents and information, including but not limited to:

- W-2 forms
- 1099 forms (e.g., 1099-INT, 1099-DIV, 1099-MISC)
- Schedule K-1 forms
- Investment and brokerage statements
- Business income and expense information
- Rental property information
- Deduction and credit documentation
- Any other relevant tax forms or documents

Please provide us with all necessary documents by [deadline date] to ensure that we have sufficient time to complete your tax return(s) by the applicable tax filing deadline.

Our fee for the tax preparation services will be based on the complexity of your tax situation and the time and effort required to complete your tax return(s). We will provide you with a detailed fee estimate for your approval before proceeding with the engagement.

It is important to note that our engagement does not include auditing or verifying the accuracy or completeness of the information you provide to us. Our responsibility is limited to the preparation of your tax return(s) based on the information you provide. You are responsible for the accuracy and completeness of the information you provide, and for maintaining appropriate records to support the information reported on your tax return(s).

If you have any questions or concerns about our engagement or the services we will be providing, please do not hesitate to contact us. We look forward to a successful and productive relationship.

Please indicate your agreement to the terms of our engagement by signing and returning a copy of this letter to our office.

Thank you for choosing [Your Tax Preparation Firm]. We appreciate the opportunity to serve you.

Sincerely, [Your Name] [Title] [Your Tax Preparation Firm]