**<Your name or your firm’s name/logo>**

**<Address and contact details>**

<date>

<client name>  
<client address>  
<client email>

Dear <client name>

**Terms of Engagement – <year> Tax Return for <name of individual>**

Further to our discussions on <date>, <we are/I am> pleased to accept your appointment as your tax agent to prepare and lodge your <year> tax return. This letter and the enclosed Terms and Conditions set out our terms of the engagement. Any changes must be mutually agreed and confirmed in writing.

**Objective and Scope of Tax Services**

As your tax agent, <we/I*>* willprepare and lodge your individual income tax return for <year>.

[Other services agreed to be provided]

In addition, you have requested we provide the following services:

* <describe additional service>
* <describe additional service>
* <describe additional service>

**Professional Fees and Payments**

All professional fees for the services provided will be based on the time and skill required to complete the tasks, including out of pocket expenses and statutory charges.

<Our/my> professional fees are (subject to written notification of changes):

Principal $ <amount> per hour

Accountant $ <amount> per hour

Secretarial $ <amount> per hour

For work undertaken for a period of less than an hour, the rate shall be charged in 6-minute blocks or part thereof. All professional fees are GST inclusive.

**Estimated Fee**

Fees are based on reasonable estimates and the actual cost may vary. It is not always possible to provide an accurate estimate of the total cost, which may change due to unforeseeable problems and delays, the cooperation of third parties and deficiencies in documentation. If costs are likely to be significantly higher than originally estimated, <we/I> will provide an additional letter of engagement setting out the reasons for any likely increase.

The estimated fee for the services agreed is $<XXX>, GST inclusive.

**Deduction of Fees from Tax Refund (optional)**

It is agreed that fees will be deducted directly from any tax refund received. In accordance with professional standards requirements, your refund will be deposited into <our/my> Trust Account with <our/my> professional fees deducted and the balance of the funds forwarded to you <within 3 Business Days of receipt from the Australian Taxation Office or specify agreed period>.

**Terms of Payment**

Unless other terms have been agreed to, <our/my> terms are strictly 14 days from the date of invoice. <We/I> will provide an itemised account of professional fees, costs and disbursements upon request. If you do not pay your account by that date, <we/I*>* reserve the right to use a debt collection agency or any other legal means to recover any outstanding fees.

Please contact <us/me> if you have any queries about this engagement. Please sign and return the confirmation of acceptance of this engagement.

<We/I> thank you for the opportunity to prepare and lodge your <year> tax return.

Yours faithfully

<Signature and detail panel with name and address of professional accountant engaging services*>*

**Client Acknowledgement and Confirmation**

I, <name of client>, hereby acknowledge and accept the terms of this engagement and agree to be liable for all professional fees and payments incurred.

Signed……………………………………..……………….

Client’s Name……………………………………….

Date…………………………………………….………….