

Estate Engagement Letter

[DATE]

[TRUSTEE]
[ESTATE NAME]
[TRUSTEE ADDRESS]

Re: [YEAR][TAX RETURN]

Dear [TRUSTEE]:

This confirms that you have engaged us to prepare your federal and [STATE][TAX RETURN] of [ESTATE NAME] for [TAX YEAR]. The fee for services is [AMOUNT]/[HOURLY FEE and FEE SCHEDULE].

This letter and the related policies, procedures and practices, which are incorporated into this letter, are intended to prevent any misunderstandings. Please read it carefully and confirm your agreement by entering your initials where indicated. We require an advance fee deposit of [AMOUNT]. Please enter your payment information to pay the advance fee and check the box to sign this agreement.

Please call or email our office if you would like to discuss this further. It is our pleasure to assist you with your tax affairs and we look forward to our working together.

Sincerely,

[ACCOUNTANT]
[ACCOUNTING FIRM]

Executed [DATE] by [TRUSTEE] on behalf of [ESTATE NAME]
(Agreement on file)