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Tax return letter

[Firm logo]

Client: [Client name]

[Date]

Dear [Client name],

I hope the new year is treating you well.

[Your company] understands that each new year brings excitement but also some stress as tax season approaches. Don't worry – as professional tax preparers, we're here to help relieve the stress of tax season so you can focus on the year's new goals.

Below, we describe everything you need to know to get your tax return started, as well as what we offer as your professional accounting firm.

Services

We offer a comprehensive range of accounting services tailored to meet your specific tax needs, including but not limited to:

- Tax Return Preparation
- E-filing
- Tax Planning and Consulting
- [Other Services if applicable]

Pricing

Our fees are built to address the complexity of your tax situation and the time required to prepare your return. We've attached a comprehensive breakdown of our pricing structure so that you know what to expect when you hire us as your professional accounting firm.

Terms and conditions

We aim to provide you with everything you need to know before you send us your tax documents. That's why we've also included a full explanation of our terms and conditions as an additional attachment to this letter.

Document checklist

To prepare a thorough and accurate tax return, please provide the following documents:

- W-2s, 1099s, and other income statements
- Records of expenses and deductions
- [Additional items as necessary]

Key deadlines and time frames

To provide you with timely service and to adhere to IRS deadlines, we request that all documents be submitted by [specific date]. Once we receive all documents, we aim to complete your tax return within [time frame].

Please be advised that if the full list of your documents is not submitted by [specific date], we cannot guarantee that your tax return will be completed by the official IRS tax deadline, and we will file an extension for you.

Accuracy and completeness

The IRS holds individual taxpayers responsible for the accuracy of their filings, so please verify that all documents and information you submit are complete and accurate to the best of your knowledge.

Thank you for choosing us as your trusted tax partner this year and we look forward to working with you. If you have any questions or need assistance, please reach out to us at [your phone number] or email me at [your email]. If you would like to move forward, please sign below and return this letter to us.

Sincerely,

[Your Name]

[Your Title, Your Company Name]

[Contact information]

Accepted and agreed to by

[Client Name]

Date:

Did you know?

- ◆ Firms see **2x faster payments** using TaxDome's automated billing
- ◆ **86% of firms** on TaxDome are **happy with their client portal**
- ◆ TaxDome's workflow automation **saves firms up to 40 hours per employee per month**

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