EMAIL TEMPLATE: BOOKKEEPERS AND TAX AGENTS

SERVICES VARIATION\_REDUCTION OF SERVICES

# PURPOSE

An email template to supply a written confirmation of a change to your services. This is especially important where you have reduced services. You want to be clear that you no longer have responsibility to perform certain tasks and have a record of this in writing.

# EMAIL FEATURES

In this email you:

* Confirm the nature of the change
* Inform your client if there is a fee increase or decrease associated with the change
* Advise your client of any impacts of the change

# EMAIL TEMPLATE

Use the template below as a starting point.

Select the options that suit your business. Select the options that suit your business. These options are in yellow highlighted text. Prompts to consider are included in red guidance text.

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| Subject Line: **Your Business Name | Your Client Name | Confirmation of Services Changes**  **Example: ABC Bookkeeping | XYZ Plumbing | Confirmation of Services Changes**  Hi [client name],  Thank you for our recent meeting to discuss the changes to the services requested from us.    The purpose of this email is to confirm the details of the changes and what it means for your business.   1. **Change** You have asked us to cease [service]. We confirm we will cease this aspect of service from DD MM YYYY. 2. **Fees** The removal of the above from our services now means your [weekly][monthly][annual] fee will reduce to $XX. 3. **Key Reminders** Now that we no longer provide [service], it is important to remember the following are now your responsibility.  * **List here (e.g. you must now file your annual return, you must now pay your GST manually, you must now reconcile your transactions]** * **List here** * **List here**   Kindly note that we will not issue reminders about upcoming dates. You shall remain responsible for any fines or penalties incurred as a result of mis-filing or late filing.  **Queries** If you have any queries, please email us or call. If you require an appointment for a more detailed query, please use this link to book a time to suit you. \*\*Use if you use scheduling tool such as Calendly, acuity etc.\*\* x  Many thanks for working with us.  [Your name]  [Email]  [Contact Number]  [Logo] |
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