

# LETTER TEMPLATE: BOOKKEEPERS ENGAGEMENT LETTER

#### **PURPOSE**

A core feature of client onboarding is your **engagement letter.** This is your record of what you have agreed.

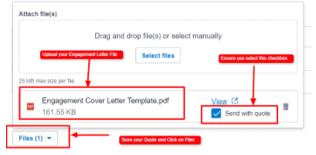
### LETTER FEATURES

In this template you:

- Confirm options selected by client for your services.
- Inform your client how to submit information and documents to you.
- Confirm payment amounts and frequency.
- Confirm to your client on how to accept the engagement.

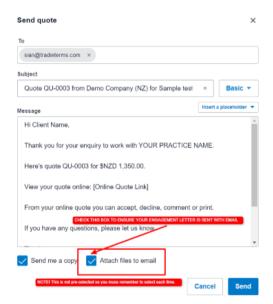
#### HOW TO ATTACH LETTER AS FILE TO XERO QUOTE

As a Xero user, you can save this letter as a PDF file and attach as a file to your quote.



Add the files to the email that is sent from Xero





## **LETTER TEMPLATE**

Use the template overleaf as a starting point.

Select the options that suit your business. These options are in <a href="yellow highlighted">yellow highlighted</a> text.

Prompts to consider are included in <a href="red guidance">red guidance</a> text.



**INSERT LOGO** 

Your Business Address

Date

Your Client Name Your Client Address

Dear [Client Name]

### **SERVICES PROPOSAL | CLIENT NAME**

Thank you for your time [on our recent call][at our introductory meeting]. It was a pleasure to meet with you and discuss your business needs.

Below is an outline of the services we discussed together with our pricing and payment terms.

\*delete this section if not applicable or select which one-off project services have been discussed with client and delete rows you do not need\*

### **Bookkeeping Services**

PLAN	INCLUSIONS	PAYMENT TERMS
Type e.g. starter plan, bronze plan	<ul> <li>Monthly categorisation of up to 100 transactions per month in the most tax advantageous manner</li> <li>Supplier bills entered into Xero so you can accurately manage your outgoing cashflow</li> <li>Secure online document collection system</li> <li>Collaboration with your accountant</li> <li>Unlimited bank accounts</li> <li>Email support</li> </ul>	\$[X] fixed fee OR \$[X] per hour  Payable monthly by [Automatic Payment][Direct Debit][Invoice]on [Day] per month [in advance][in arrears based on hours used].
Type e.g. essentials	Everything in starter plan plus:	\$[X] fixed fee OR



plan, silver	<ul> <li>Weekly categorisation of up to \$[X] per hour</li> </ul>	
plan	100 transactions per month in	
	the most tax advantageous Payable monthly by	y
	manner [Automatic Paymer	nt][Direct
	o GST Returns Debit][Invoice]on [[	Day] per
	<ul> <li>Simple financial reports and month [in advance]</li> </ul>	[in arrears
	recap delivered to your inbox based on hours use	ed].
	each quarter	

\*delete this section if not applicable or select which one-off project services have been discussed with client and delete rows you do not need\*

## **One-Off Project Services**

PROJECT SERVICE	INCLUSIONS	PAYMENT TERMS	
Xero Training Support	e.g. Includes:  • Xero Training [X] Mins Online Video Training	[Fixed Fee] of \$[x] 50% payable on acceptance of this proposal and 50% one month later.  OR	
		Hourly Rate applies at \$[x] per hour.	
Xero SetUp	<ul><li>Describe</li><li>Describe</li></ul>		
Xero Cleanup	<ul><li>Describe</li><li>Describe</li></ul>		
Software Implementation (Name of Software)	<ul><li>Describe</li><li>Describe</li></ul>		
Note 1:	Where additional scope is agreed, such work shall be chargeable at our standard hourly rates and shall be added to the final completion invoice.		
Note 2:	Xero training is subject to booking. Any missed appointment may be chargeable where you have not rescheduled with 48 hours advance notice.		
Note 3:	All fees exclude GST.		

## **How to Confirm Acceptance**



Please confirm your acceptance of our services by clicking on the link supplied with your quote.

We will then contact you with details on how to get set up with us.

#### Questions

If you have any questions, please contact us on [insert email address]. We look forward to working with you.

[Your name]
[Your company name]