



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.

A screenshot of the Xero 'Attach file(s)' interface. The interface includes a dashed box for dragging and dropping files, a 'Select files' button, and a '25 MB max size per file' note. A file named 'Engagement Cover Letter Template.pdf' (161.55 KB) is shown with a red box around it. To the right of the file is a 'View' link and a checked 'Send with quote' checkbox, also highlighted with a red box. At the bottom left, a 'Files (1)' dropdown is highlighted with a red box. Red arrows point from text annotations to these elements: 'Upload your Engagement Letter File' points to the file name; 'Ensure you select this checkbox' points to the 'Send with quote' checkbox; and 'Save your Quote and Click on Files' points to the 'Files (1)' dropdown.

Add the files to the email that is sent from Xero



Send quote ×

To
sian@tradieterms.com ×

Subject
Quote QU-0003 from Demo Company (NZ) for Sample test × **Basic** ▼

Message Insert a placeholder ▼

Hi Client Name,

Thank you for your enquiry to work with YOUR PRACTICE NAME.

Here's quote QU-0003 for \$NZD 1,350.00.

View your quote online: [Online Quote Link]

From your online quote you can accept, decline, comment or print.

CHECK THIS BOX TO ENSURE YOUR ENGAGEMENT LETTER IS SENT WITH EMAIL.

If you have any questions, please let us know.

☒ Send me a copy ☒ Attach files to email

NOTED! This is not pre-selected so you must remember to select each time. Cancel Send

LETTER TEMPLATE

Use the template overleaf as a starting point.

Select the options that suit your business. These options are in **yellow highlighted** text. Prompts to consider are included in **red guidance** 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 style="list-style-type: none">Monthly categorisation of up to 100 transactions per month in the most tax advantageous mannerSupplier bills entered into Xero so you can accurately manage your outgoing cashflowSecure online document collection systemCollaboration with your accountantUnlimited bank accountsEmail support	<p>\$(X) fixed fee OR \$(X) per hour</p> <p>Payable monthly by [Automatic Payment][Direct Debit][Invoice] on [Day] per month [in advance][in arrears based on hours used].</p>
Type e.g. essentials	<ul style="list-style-type: none">Everything in starter plan plus:	<p>\$(X) fixed fee OR</p>



plan, silver plan	<ul style="list-style-type: none"> Weekly categorisation of up to 100 transactions per month in the most tax advantageous manner GST Returns Simple financial reports and recap delivered to your inbox each quarter 	\$[X] per hour Payable monthly by [Automatic Payment][Direct Debit][Invoice] on [Day] per month [in advance][in arrears based on hours used].
-------------------	---	--

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	<i>e.g. Includes:</i> <ul style="list-style-type: none"> 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 style="list-style-type: none"> Describe Describe 	
Xero Cleanup	<ul style="list-style-type: none"> Describe Describe 	
Software Implementation (Name of Software)	<ul style="list-style-type: none"> Describe Describe 	
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]