



LETTER TEMPLATE: ACCOUNTANT ENGAGEMENT LETTER

PURPOSE

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

Important note: This does not include any AML requirements.

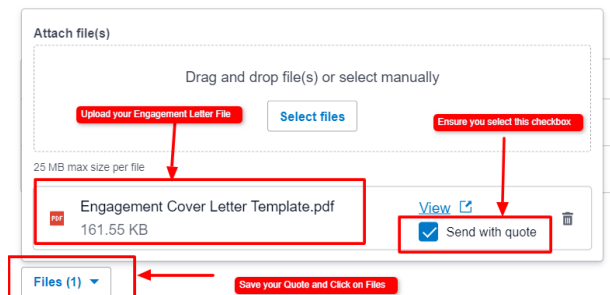
LETTER FEATURES

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



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

NOTE! 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

Accounting Services – Annual

SERVICES	PAYMENT TERMS
<ul style="list-style-type: none"> • Financial Statements and Tax Returns • GST Return Preparation • Tax Planning Review • Cash-flow Reports 	\$[X] fixed fee per annum
Note 1:	Additional services shall be chargeable at our hourly rate of \$X +GST.
Note 2:	A one-off establishment fee of \$x is chargeable to set you up as a client. Activities include: <ul style="list-style-type: none"> • Requesting transfer of your records from a previous accountant for files and records • Review of files to identify immediate taxation issues to address • Registration as your tax agent with IRD



	<ul style="list-style-type: none"> Perform any other necessary client checks and registrations
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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][MYOB] Set-up	<ul style="list-style-type: none"> Describe Describe 	
[Xero][MYOB] 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.	

Terms of Engagement

You may view our full terms of engagement at www.yourwebsite.co.nz/terms-of-engagement

How to Confirm Acceptance

Please confirm your acceptance of our services by clicking on the link supplied with your services proposal via Xero.



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]