

## Client Expectations Letter

*Note: Adjust all highlighted areas to your firm's protocols.*

Choosing an accounting firm is an important decision. We are honored you chose to begin a relationship with our firm. Thank you for your trust!

Successful, long-lasting relationships are built on a clear understanding of expectations and responsibilities.

The best way to start a new relationship is with clear, open communication. This letter sets the tone for long-lasting relationships.

Let us know if you have any specific questions, concerns or need to clarify a detail. We'll set up a personal conversation to answer your questions.

Once again, thank you for your confidence. We look forward to working with you.

### Our Commitment to you:

- We provide professional services with integrity, diligence and objectivity.
- We maintain the knowledge and the skills to provide competent professional services.
- We will be fair and reasonable in our professional relationship and disclose any conflicts of interest.
- We protect the confidentiality of all client information.
- We aim to perform without errors. Sometimes, however, mistakes occur. If so, we will admit it and take immediate steps to rectify the situation.
- We are always transparent in regards to fees.

### Ongoing Service:

- **Meeting Frequency:** Annually, Semi-annually and Quarterly
- **Phone Call Frequency:** Annually, Semi-annually and Quarterly
- Monthly financial updates in client portal.
- 24/7 online access to client portal.
- Bookkeeping Quarterly Performance Report.

### Scope of Work:

- Our work agreement defines the scope of work.
- Requests outside of scope are considered on a case-by-case basis.
- Services which extend beyond the work agreement are charged an additional fee.
- Although we make every effort to accommodate our clients, some additional requests may not be appropriate for our firm.

## Communication:

### Phone & Email

- Most communications are delivered by email.
- Calls and emails from clients will be returned within 1 to 3 business days.
- Regular office hours are Monday through Friday from 9:00 AM - 5:00 PM.
- Our office will be closed on Holidays and days when the banks are closed.
- **Reports:** Annually, Semi-annually and Quarterly

### Scheduled Meetings

- Review meetings are scheduled Tuesday through Thursday between 9:00 AM and 3:00 PM. We will set all of your appointments when you onboard. You may request to reschedule one of your set appointments at any time by emailing us.
- **(Note: keep this if you don't set all of your meetings at the beginning of the year)** Our policy is to contact you via email 2 times to schedule an appointment. If we don't hear back from you, we will adjust the schedule to contact you for your next scheduled meeting.

## Accountants Expectations of Clients:

- Clients will provide us with financial data by the 5<sup>th</sup> of the following month.
- Clients will respond to requests for information or paperwork within 3 business days.
- Clients' requests for financials will be sent within 3 business days.
- Clients will keep scheduled appointments.
- Clients will notify us promptly of any changes in their situations.

- Clients will be candid and honest regarding their situations.
- Clients will tell us if they are unhappy. We appreciate all feedback.
- Clients will treat accountants and staff with dignity and respect.
- Clients understand that some clerical tasks are handled by staff and not by the accountant.

### Methods to Receive Payment:

- ACH
- Checks
- Credit Card

### Fees:

- Fees will always be clearly outlined and transparent.
- Your fee may be tax deductible in certain situations. Please contact your tax advisor for more information.
- Your fee, as agreed, will be a flat annual fee in the amount of \_\_\_\_\_.
- Fees are charged to the account automatically at the beginning of the month.
- Fees are pre-paid before the firm performs that month's services.
- All subscriptions to third party applications **(Option 1)** will be paid separately / **(Option 2)** are the responsibility of the client to maintain current subscriptions to third party applications.

### Staff and Resources:

The members of our firm who will work with you are:

#### **Your name**

President

Accountant

#### **Team Member's Name**

Client Relationship Manager

- Meeting prep (Review Questionnaire)
- Schedule meetings
- Financial information, requests and meetings
- Password resets for portal

#### **Team Member's Name**

Bookkeeper / Office Manager

- Monthly bookkeeping
- Financial reports
- Payroll

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Client Signature

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Date

Let's talk. If this appeals to you, and wonder how to apply this to your firm, then let's talk.

Take advantage of the complimentary **Path to Profits Strategy Session**. We'll discuss how to increase your income while lightening your workload.

Go to <https://www.businesssuccesssolution.com/letstalk/>

