



Bookkeeper Engagement Letter

To

Client's Name

Address

Dear _____,

I am writing to confirm our agreement for bookkeeping services for your business. This letter outlines the scope of services we will provide and the terms of our engagement in line with our pre negotiations.

Check out and approve this letter to start our business relationship. Please do not hesitate to ask any questions.

Sincerely,

Scope of Services

As a bookkeeper, I will provide the following services;

- **Recording Transactions** - I will record financial transactions, post debits and credits, create invoices, manage payroll, and maintain and balance the books. I will record all financial transactions related to your business in the accounting software of your choice.
- **Reconciliation** - I will reconcile your bank and credit card accounts to ensure that your records match those of your financial institutions.
- **Financial Reports** - I will prepare monthly or quarterly financial reports, including a profit and loss statement, balance sheet, and cash flow statement, to help you monitor the financial health of your business.
- **Other services** - I will also provide other bookkeeping services as required, such as accounts receivable and accounts payable management.

Terms of Engagement

After your approval, our engagement will begin on _____ and continue until terminated by either party.

I will charge a fee of _____ for the services provided. Payment shall be made monthly, on the 5th day of each month at the latest. Please keep in mind that I reserve the right to suspend services if payment is not received within 10 days of the due date.

Confidentiality and Data Protection

I may have access to confidential financial information and understand the importance of confidentiality and data protection, and I will maintain the confidentiality of your all financial information and comply with all applicable data protection regulations. I agree and undertake not to disclose any financial information of yours to any third party without the prior written consent, except legal requirements.

Limitation of Liability

I will provide bookkeeping services to the best of my abilities, with reasonable care and skill. However I cannot guarantee the accuracy or completeness of your financial records. My liability for any errors or omissions in my services will be limited to the fees paid for those services.

Termination

As agreed in our pre negotiations, either party may terminate this engagement upon _____ days' written notice to the other party.

If you agree to these terms, please sign below. If you have any questions, please don't hesitate to contact me.

Sincerely,

The Bookkeeper

Date

Signature

As of the date of _____, I agree
the terms of this engagement.

The Client

Signature

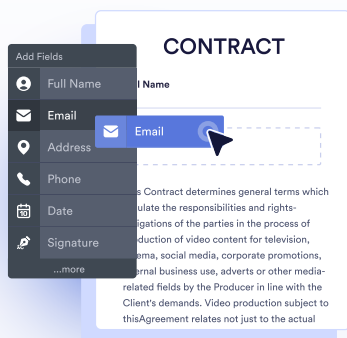


Thanks for using **Bookkeeper Engagement Letter!** To edit this PDF with **Jotform Sign**, sign up for a free Jotform account today.

[EDIT PDF](#)

Learn More About Jotform PDF Products

Jotform offers powerful PDF solutions. Check them out below.



JOTFORM PDF EDITOR

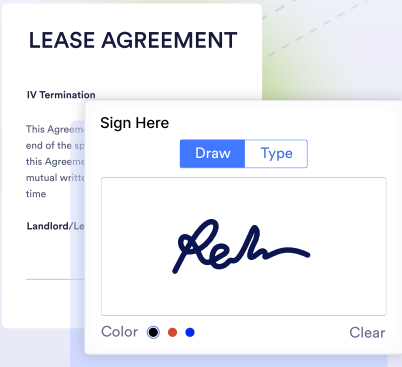
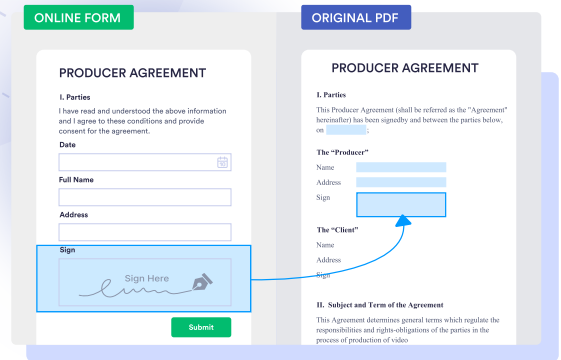
Turn form submissions into PDFs automatically — ready to download or save for your records.

[Go to PDF Editor >](#)

SMART PDF FORMS

Convert your PDF files into online forms that are easy to fill out on any device.

[Go to Smart PDF Forms >](#)



JOTFORM SIGN

Collect e-signatures with Jotform Sign to automate your signing process.

[Go to Jotform Sign >](#)

These templates are suggested forms only. If you're using a form as a contract, or to gather personal (or personal health) info, or for some other purpose with legal implications, we recommend that you do your homework to ensure you are complying with applicable laws and that you consult an attorney before relying on any particular form.