[Engagement Letter – QuickBooks® Training – 6\_30\_03]

[Your Letterhead Stationery]

<<**Date**>>

<<**Client Name**>>

<<**Company Name**>>

<<**123 Anywhere Drive**>>

<<**Anytown, ST 45678**>>

Dear <<**Client Name**>>:

We appreciate the opportunity of providing QuickBooks® training services to <<**Company Name**>>. To ensure a complete understanding between us, this letter will describe the scope and limitations of the services we will provide for you. <<**Employee Name**>> will be the contact person for this engagement.

**What We’ll Do**

We will present a series of programs called QuickBooks Training for <<**Company Name**>>. The program will be customized to meet the needs of the group being trained. The content will include eight hours of company set up; customer, vendor, employee, and item set up; writing checks and paying bills; invoicing and receiving payments; inventory; payroll; and file backup. Training materials will be provided for the use of each participant. The programs will be conducted by <<**Employee Name**>>. The location of the presentation will be **<<Presentation Location>>**. The room set up will be classroom style and the equipment needed will be a data projector and screen. PCs with QuickBooks Premier Edition 2010 and Windows Vista loaded will be provided to each participant during the course. Class size is limited to 12. We will make all arrangements for the location of the program. <<**Company Name**>> will be responsible for informing the participants. We encourage you to audiotape and/or videotape the program. These tape copies, plus the training materials may not be sold, but distributed to your internal staff only.

**What We Won’t Do**

All files, forms, journal entries, transactions, and reports created during the training session are for training purposes only. We will make no attempt to adjust the records to reflect Generally Accepted Accounting Principles nor to reflect proper tax record keeping. We will make no audit or other verification of the accounting data you submit. We may provide reports that contain portions of financial information; these reports are for internal management use only. We will not provide any financial statements and will not perform any compilation, review or audit of any of the financial information. We do not at any time provide legal services of any type. We have not been requested to discover errors, misrepresentations, fraud, illegal acts, or theft. Therefore, have not included any procedures designed or intended to discover such acts, and you agree we have no responsibility to do so.

**What We Need from You**

To perform our services, we will need to obtain information on a timely and periodic basis from your company. These items include a list of participants and their experience level, topics expected to be covered, company files and sample transactions to make the training more realistic, and any other information that we may require to complete the work of this engagement. These items and any other items that we obtain from you will be based on information provided by you and will be used without any further verification or investigation on our part.

**When We’ll Do It**

The date and time of the presentation will be **<<Presentation Date and Time>>**.

**Hardware and Software Warranties**

During the course of the engagement, we may recommend a purchase and installation of computer or technological hardware, software, communications, or services by your company. Warranties, to the extent they exist, are provided only by the manufacturer/vendor of those computer products.

**Services Outside the Scope of this Letter**

You may request that we perform additional services at a future date not contemplated by this engagement letter. If this occurs, we will communicate with you regarding the scope and estimated cost of these additional services. Engagements for additional services will necessitate that we issue a separate engagement letter to reflect the obligations of both parties.

**Fees**

Our fee for these services will be <<**£xx**>>, plus any out-of-pocket expenses, including room rental, equipment charges, and instructor travel. A deposit of <<**£xx**>> is required to reserve the program and is due upon booking. If the program is cancelled by <<**Company Name**>> more than 90 days before the program date, there will be a 75 percent refund. If the program is cancelled by <<**Company Name**>> less than 90 days and more than 30 days before the program date, there will be a 50 percent refund. If the program is cancelled by <<**Company Name**>> less than 30 days before the program date, there will be no refund.

**Approvals**

We are pleased to have you as a client and hope this will begin a long and pleasant association. Please date and sign a copy of this letter and return it to us to acknowledge your agreement with the terms of this engagement.

 Sincerely yours,

 <<**Your signature**>>

Acknowledged:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

<<**Customer**>> <<**Date**>>