ACCOUNTANCY PRACTICE LAUNCH PROGRAMME · CREATE YOUR ENGAGEMENT LETTERS AND TERMS OF BUSINESS

Engagement letter toolkit

Every section a good engagement letter and terms of business should cover, and where to start from. A signpost, not advice.

01 Start from a proforma

Do not draft from a blank page. Recognised templates already cover the ground.

- [ ] Use a recognised template: the CIOT/ATT engagement-letter templates (produced with AAT and ACCA), or the ICAEW TAS helpsheet.

02 Cover every section

A good engagement letter and terms of business should address all of these.

- [ ] Scope of work, with clear exclusions of what you are not doing.
- [ ] Fees and payment terms.
- [ ] Each party's responsibilities, yours and the client's.
- [ ] Termination: how either side ends the engagement.
- [ ] Limitation of liability.
- [ ] GDPR and privacy.
- [ ] Your client-money position: whether you hold it or not.

03 Get it signed

A letter that is never signed protects nobody.

- [ ] Get the letter signed before you start work, not after.
- [ ] Use a schedule per service so you can add or remove services without rewriting the whole letter.

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