*This template is not legal advice. Professional rules for engagement letters differ by profession and country; have the final letter reviewed by a qualified professional.*

[Your firm name]

[Address]

[Date]

[Client name]

[Client address]

**Re: Engagement letter — [short description of services]**

Dear [Client name],

Thank you for choosing [Firm] to [purpose]. This letter sets out the terms of our engagement.

## 1. Client

[Who exactly is the client — person or entity. Who is not the client (e.g. related parties).]

## 2. Scope of services

[What we will do.]

## 3. Services not included

[What we will not do unless agreed in writing.]

## 4. Responsibilities

**Ours:** [...]

**Yours:** [information, documents, decisions, deadlines]

## 5. Staffing

[Who will work on the matter and who is responsible.]

## 6. Fees and expenses

[Basis: hourly / fixed / retainer / contingency where allowed. Rates, estimate, expenses, retainer deposit.]

## 7. Billing and payment

[Invoice frequency, payment terms, late payment.]

## 8. Communication

[Preferred channels, response times, who to contact.]

## 9. Confidentiality and data

[How client information is handled and stored.]

## 10. Conflicts of interest

[Conflict check performed; how new conflicts are handled.]

## 11. Term and termination

[Start date, end of engagement, how either party can end it, what happens to files.]

## 12. Limitation of liability, complaints, governing law

[As required or allowed by your profession's rules.]

## 13. Acceptance

Please sign and return a copy of this letter to confirm these terms.

Sincerely,

[Name, title]

Agreed and accepted: _____ [Client name, title], Date: _____

## How to fill it in

- Name the client precisely — it defines to whom duties are owed.
- Describe the scope and, just as clearly, what is excluded.
- State the fee basis and give an estimate when you can.
- List what the client must provide and by when.
- Check your profession's rules for mandatory clauses (complaints, liability, retention of files).
- Send it before work starts and keep the signed copy.

## What must not be in an engagement letter

- Guarantees of outcome.
- Vague scope ("general advice as needed") without limits.
- Fee arrangements your professional rules do not allow.