

Title: ENGAGEMENT LETTER – INDIVIDUAL / SOLE TRADER

Client: tttt

Date: 04 January 2026

1. Our engagement

This letter sets out the basis on which Habesha Tax & Support (“we”, “us”) will provide professional services to you (“you”, “your”). Please read it carefully and keep a copy for your records.

2. Services covered

We will provide the services you have agreed with us, which may include (as applicable):

- Self Assessment (SA) tax return preparation and submission
- Bookkeeping support and record organisation
- VAT / Making Tax Digital support (if applicable)
- Payroll support (if applicable)
- General tax guidance related to the above services

Any services not listed above are outside the scope of this engagement unless agreed in writing.

3. Your responsibilities

You agree to:

- Provide complete and accurate information on time
- Keep proper records and supporting documents (income, expenses, bank statements, receipts, invoices)
- Review drafts we send you and confirm approval before submission
- Inform us promptly of any changes in your circumstances (address, business activity, income sources, marital status, etc.)

You remain responsible for the accuracy of your tax return and information supplied to HMRC.

4. Our responsibilities

We will:

- Use reasonable skill and care to provide the agreed services
- Prepare your returns using the information you provide
- Keep you informed of key deadlines we are aware of within the scope of work
- Maintain confidentiality, except where disclosure is required by law

5. Fees and payment

The agreed fee is £600 (one-off).

Unless agreed otherwise, additional work outside the services listed above will be charged separately. We will tell you before any additional chargeable work is undertaken.

6. Deadlines and turnaround

Our ability to meet deadlines depends on you providing information promptly. Where submissions are urgent or information is provided late, we may not be able to guarantee submission by the deadline.

7. Records and document storage

You should keep your records and documents for the period required by HMRC. We may store copies of documents you provide in our secure system for service delivery and audit purposes.

8. Data protection

We process your personal data to provide services, comply with legal obligations, and manage our business operations. We will handle your information in accordance with UK data protection laws.

9. Anti-money laundering (AML)

We are required by law to comply with anti-money laundering regulations. We may request identity documents and information about the source of funds. If required, we may also carry out verification checks.

10. HMRC communication and authority

If you ask us to act as your agent, you authorise us to deal with HMRC on your behalf for the agreed services, subject to HMRC authorisation procedures.

11. Limitation of liability

We are not responsible for:

- Penalties, interest, or additional tax arising from incomplete, inaccurate, or late information provided by you
- Losses arising from matters outside the agreed scope of work
Nothing in this engagement limits liability for fraud or matters that cannot legally be excluded.

12. Complaints

If you are unhappy with our service, please contact us as soon as possible so we can address your concerns promptly.

13. Acceptance

By proceeding with our services, you confirm you understand and accept the terms of this engagement.

Signed (Client): _____ **Date:** _____

Signed (Habesha Tax & Support): _____ **Date:** _____