THIS IS A TEMPLATE PROVIDED AS AN EXAMPLE AND FOR INFORMATIONAL PURPOSES ONLY. THIS IS NOT BEING PROVIDED AS A LEGAL DOCUMENT. NO LIABILITY IS ACCEPTED FOR ANY OF YOUR USE OF THIS EXAMPLE. ENSURE YOU ARE TAILORING THIS TO YOUR SERVICES AND NEEDS. YOU SHOULD CONSULT AN ATTORNEY FOR ANY QUESTIONS OR TO ENSURE THE EFFECTIVENESS AND COMPLETENESS OF ANY WITHDRAW LETTERS YOU SEND.

Date

Name (both spouses, and children if applicable)
List all businesses by legal name involved if any

Dear :

We have appreciated the opportunity to serve you in the past. We are sending a formal withdrawal of services letter with the effective date being _____ or the last time we charged for services, whichever is earlier. This is effective for all companies and you individually.

You still owe us $_____, and we will need payment within _____. An additional copy of such outstanding invoices is enclosed. There will be a penalty of ___% (or amount $___) add on the 1st of each month starting the 1st of next month. If full payment is not received within 30 days, we will bring in a 3rd party to collect this amount.

It will be necessary for you to obtain the services of another firm to prepare any and all tax returns, including the ____ year Federal and state individual and business income tax and informational returns. Your _____ year business income tax returns (if applicable) are due by _____. Your _____ year individual income tax returns are due by _____. If applicable, your estimated tax payments for ____ year are due _____, _____ and _____. For any other services _____, such forms are ____, with due dates of ____. These due dates are provided based on the requirements as of the date of this letter. Such due dates are subject to change, and you need to consult your new tax adviser of any such dates.

There are penalties and interest for paying taxes late and filing late, up to 25% each. You will need to have your new accountant assist you with these and any other matters, including preparing and filing any extensions for either your businesses or your individual returns, should you not file your returns by the above due dates. Extensions are not an extension of time to pay, just an extension of time to file.

(If applicable) You have not engaged us for any services to prepare or file any payroll, sales tax reports or other tax reports with any other governmental agencies, and thus, if you have these issues, you need to continue prepare these items or have your new accountant assist you. I am unable to indicate any related future due dates, as I have not been engaged by you for such services.

Let us know how we may help make a smooth transition with your new accountant. We are prohibited from communicating with any 3rd party directly regarding your affairs, regardless of your approval. We will not be able to meet with you or communicate with you by phone or text. Any future communications will only be by email or written letter. All original documentation is being returned to you, so there is nothing to provide to you, and there is nothing else you need from our office or your files. If you request additional copies of documents, we have already provided to you, we will require payment in advance for the time and expense associated with your request and will respond within 90 days of your written request. All other correspondence must be in writing and mailed to our office. We are not required to respond otherwise. If we choose to respond, we will do so in writing within approximately 90 days. Any documentation, files, in any form, we are required to maintain under IRS rules, we will permanently destroy on January 1st of the upcoming year. If you have previously approved us as Power of Attorney for any tax matters, that is withdrawn as the applicable date above. Should we receive any correspondence from a tax authority regarding you or your businesses, we will forward that to you within 30 days upon receipt, but will not be available to represent you in such matters, and will not otherwise advise, respond or resolve such matters, as you will need to consult your new accountant on all such matters If there are any services we have performed in the past, or you have expected us to perform, not otherwise listed here within, please consider this an absolute and complete withdrawal of all services.

Again, thank you for the opportunity to work with you in the past. Best of luck!

Sincerely,