KasemCPA

Ahmed Kassem, CPA · Ahmed@kasemcpa.org
+20 106 600 8890 · kasemcpa.org

Engagement Letter and Terms of Service

Standard terms for accounting, tax and ERP engagements

1. Engagement letter

[Date]

[Client company name] [Address] Attention: [Contact name, title]

Dear [Contact name],

Thank you for choosing KasemCPA. This letter confirms the terms on which KasemCPA (Ahmed Kassem, Giza, Egypt; Ahmed@kasemcpa.org; kasemcpa.org) will provide the services described in our proposal number KCPA-[YYYY]-[###] dated [date] (the “Proposal”).

The Proposal sets out the scope, timeline and price. These terms apply to that work and to any later work you ask us to do, unless we agree otherwise in writing. Where the Proposal and these terms differ, the Proposal wins on scope and price, and these terms win on everything else.

Please sign and return this letter, or confirm by email, together with the first payment. Work starts on receipt of both.

Kind regards,

Ahmed Kassem
Founder, KasemCPA

2. Services and responsibilities

Our services. We provide the services in the Proposal, which may include bookkeeping, financial statements, tax and e-invoicing compliance, ERP implementation and support, audit support and CFO advisory. We work remotely, with due care and in line with applicable accounting standards (IFRS or local GAAP as agreed).

What we will do

- Deliver the agreed scope on the agreed timeline, and tell you early if anything puts it at risk.
- Reply to messages within 1 working hour during our working hours.
- Keep working papers and configuration notes for the work we do.

What you will do

- Give us complete, accurate and timely information, documents and system access.
- Name one person who can approve decisions within 3 working days.
- Keep your original records and remain responsible for your books, tax returns and business decisions.
- Review and approve filings, reports and system changes before they are submitted or go live.

Delays caused by missing information or approvals extend the timeline and may be charged as extra time.

3. Fees and payment

- **Fees** are as stated in the Proposal: a fixed price for projects, a fixed monthly fee for retainers, or an hourly rate of [Currency] [rate] for advisory and change requests.
- **Retainers** are invoiced at the start of each month. Work above the agreed monthly volume is charged at the hourly rate, after we tell you.
- **Invoices** are payable within 7 days by bank transfer, Upwork or [PayPal]. Prices exclude VAT and any withholding tax, which are added where they apply.
- **Late payment:** we may pause work when an invoice is more than 14 days overdue, and resume once it is paid.
- **Expenses:** third-party costs (software licences, hosting, government fees) are paid by you directly, or re-invoiced at cost with your prior approval.

4. Confidentiality, data and ownership

- **Confidentiality.** We keep your financial, business and personal data confidential and use it only to provide the services. We do not share it with anyone except where you approve, where the law requires it, or with subcontractors bound by the same duty.
- **Data security.** We access your systems with named user accounts, never shared passwords, and remove our access when the engagement ends. Personal data is handled in line with the data-protection law that applies to you (for example Saudi PDPL, UAE PDPL or Egypt Law 151 of 2020).
- **Your records** remain yours. On request at the end of the engagement, we return or delete your documents, keeping only copies the law requires us to keep.
- **Work product.** Once paid in full, you own the deliverables made for you (configurations, reports, templates). We keep our general know-how, tools and methods, and may reuse them for other clients without your confidential data.
- **References.** We will name you as a client or describe your project publicly only with your written permission.

5. Limits of the service and liability

- **Not a statutory audit.** Our audit and assurance support is a review for management. It is not a statutory audit and does not give an audit opinion unless the Proposal says so in writing.

- **Not legal advice.** We advise on accounting, tax and systems. For legal questions we will tell you when you need a lawyer.
- **Tax filings** are prepared from the information you give us. You review and approve each filing, and remain responsible to the tax authority for what is filed.
- **Software.** We configure third-party software (Odoo, QuickBooks and others) but do not control its vendors, updates or outages.
- **Liability.** Our total liability for any claim under this engagement is limited to the fees you paid for the work that gave rise to the claim in the 12 months before it. We are not liable for indirect losses such as lost profits, or for losses caused by incomplete or incorrect information you gave us.
- **Fixing mistakes.** If our work contains an error, tell us within 30 days of delivery and we will correct it at no extra cost.

6. Term, termination and signatures

- **Term.** Projects end when the final milestone is accepted. Retainers run month to month.
- **Ending the engagement.** Either side may end a retainer with 30 days' written notice, or a project with 14 days' notice. You pay for work done up to the end date. We hand over all work in progress and your data.
- **Immediate termination** is allowed if the other side seriously breaches these terms and does not fix it within 14 days of written notice.
- **Governing law.** These terms are governed by the laws of [Arab Republic of Egypt / the client's country]. Both sides will first try to settle any dispute in good faith within 30 days, then before the courts of [city].
- **Whole agreement.** This letter and the Proposal are the whole agreement for this engagement. Changes must be in writing, which includes email.

	KasemCPA	**Client**
Name	Ahmed Kassem	[Name]
Title	Founder	[Title]
Company	KasemCPA	[Company]
Signature		
Date		