

[Your firm name and logo]

[Firm name]

[Firm address] | [Phone]

[Date]

[Recipient name]

[Recipient address]

Re: [Client name], [loan / application / file number]

Dear [Recipient contact name],

Relationship

At the request of our client, [Client name], we confirm that our firm prepared [his / her / their] federal income tax returns for tax years [YYYY] and [YYYY].

Filing (optional)

Those returns were filed with the Internal Revenue Service on [date] and [date].

Self-employment

On those returns, [Client name] reported self-employment income from [business name] on Schedule C [or: reported income from (entity name) on Schedule K-1, showing (X)% (profit / loss / capital share on a partnership K-1, or stock ownership on an S corporation K-1)].

Amounts as reported (optional)

As reported on the [YYYY] return as filed, and without verification by us, net profit from [business name] was \$[amount]. [Or, instead of an amount: With (Client name)'s consent, we can send you a copy of the return as filed.]

Duration (optional)

Based on our records, [business name] has reported business activity since at least tax year [YYYY].

Basis

The returns were prepared from information furnished by [Client name]. We did not audit, review or otherwise verify that information.

No assurance

Accordingly, we express no opinion or any other form of assurance on [Client name]'s income, financial condition, solvency or ability to meet any obligation.

Date and updates

This letter speaks as of its date. We have no obligation to update it for events after that date.

Use

This letter is provided solely for [Recipient name]'s use in connection with [purpose] and may not be relied on by anyone else.

Consent

It is sent with the written consent of [Client name] dated [date].

Sincerely,

[CPA name], CPA
[Title], [Firm name]
License: [State] [number]