

Personalizing an Engagement Letter in Hub

There are two options for personalizing an engagement letter in Hub:

- use an existing engagement letter (a "template")
- create a new engagement letter

Using an Existing Engagement Letter

- 1. Open the ProFile application.
- 2. Select the "Hub" option from the "Goto" menu in the top toolbar.



3. Hub opens, displaying a list of clients. Identify the client to whom you want to send an engagement letter (e.g., "John, Alexis"). Click the "Invite" button associated with the client.

Pr	ProFile Hub								
	Action(s)	*		Search (Client Name or File I	Name)		ч \$		
	NAME	FILE NAME	INTUIT LINK	COMMENTS	STATUS	-	LAST SAVED	*	
	Simpson, Jessica (647) 777-7776 🛛	71 JessicaSimpson V2.123.15T	0/12	Payment is done.	Waiting For Client	•	Dec 16, 2016		
	Simo, Jessica (647) 777-7776 🛛 💌	71 JessicaSimpson V2123.15T	0/12	Payment is done.	Completed	-	Dec 14, 2016		
	Gupta, Varun	71 T2205_1.15T	Invite	This is an awesome file completed through the ProFile Hub	Carried Forward	•	Jan 30, 2017		
	Smith, John 🖂	71 T2205_10.15T	Invite Rejected	This is a sample character limite	In Partner Review	-	Dec 14, 2016		
	Wang, Phil 🖂	71 T2205_159.15T	Invite	Add Note	Work In Progress	•	Dec 14, 2016		
	John, Alexis (647) 949-6946 💟	71 T2205_160.15T	Invite	Add Note	Work In Progress	•	Dec 16, 2016		



4. The "Invite Clients to Use Link" window opens. Select the "Edit" link from the "Engagement Letter" option.

Invite Clients To Use Link	x
To: Phil Wang 🛞	
Customize your invitation email below:	
Dear [CLIENTNAME],	
At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you. - We'll guide you through some questions, the documents needed, and let you know when you're done. - It's much more secure than sending by email so your personal information is safe! - Use your phone to snap photos of your documents much faster than using a scanner. Please sign up and get started. Regards, [FIRMNAME]	
Engagement Letter Questionnaire Checklist (6) Edit Image: Do not include Image: Do not include Image: Do not include Image: Do not include	
Cancel	

5. The "Edit Engagement Letter" window opens. Click the drop-down menu at the top of the window; a list of existing templates already created displays:

E	Basic Engagement Letter Add Delete
B	Basic Engagement Letter
-	
	Letter of Engagement
	We appreciate the opportunity to work with you and advise you on income tax matters. Canada Revenue Agency (CRA) impose penalties upon taxpayers, and upon us as tax return preparers, for failure to observe due care in reporting on your income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements.
	We will prepare your personal income tax return based on information that you provide to us. We will not audit or otherwise verify the data you submit, although we may ask you for clarification of some of the information. It is our responsibility to prepare your tax return correctly according to the law and the information that you have provided. It is your responsibility to provide us with all the information required to prepare complete and accurate returns. You should retain all the documents, cancelled cheques and other data that form the basis of your income and deductions. These may be necessary to prove the accuracy and completeness of the return to CRA. You have the final responsibility for the income tax return and, therefore, you should review it carefully before you sign it.
	By signing this letter, you represent that you will provide us with accurate and complete information necessary to prepare your tax return. This includes informing us of all interests you held in foreign properties with an aggregate cost in excess of \$100,000 at any time in the year, as well as all income



6. Select the template engagement letter to send to the client. Additional edits may be made in the editing window. To save any new changes, select the "Add" button above the editing window.

Edit Eng	jagement Letter	
Le	etter of Engagement - Add Delete	
	Letter of Engagement	*
	We appreciate the opportunity to work with you and advise you on income tax matters. Canada Revenue Agency (CRA) impose penalties upon taxpayers, and upon us as tax return preparers, for failure to observe due care in reporting on your income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements.	ш
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	By signing this letter, you represent that you will provide us with accurate and complete information necessary to prepare your tax return. This includes informing us of all interests you held in foreign properties with an aggregate cost in excess of \$100,000 at any time in the year, as well as all income from any foreign properties regardless of their aggregate value and all income and transactions relating	Ŧ

- 7. Click the "Done" button; the letter saves.
- 8. Click the "Invite" button in the "Invite Clients to Use Link"; the engagement letter is sent to the client.

Invite Clients To Use Link	×
To: Phil Wang 🛞	
Customize your invitation email below:	
Dear [CLIENTNAME],	
At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you. - We'll guide you through some questions, the documents needed, and let you know when you're done. - It's much more secure than sending by email so your personal information is safe! - Use your phone to snap photos of your documents much faster than using a scanner. Please sign up and get started. Regards, [FIRMNAME]	
Engagement Letter Questionnaire Checklist (6) Edit Do not include Do not include Do not include Do not include	
Cancel	

Adding a New Engagement Letter

1. Navigate to the client list in Hub. Identify the client to whom you want to send an engagement letter (e.g., "John, Alexis"). Click the "Invite" button associated with the client.



Pr	ProFile Hub								
	Action(s)	Ŧ		Search (Client Name or File I	Name)	प \$			
	CLIENT INFORMATION DATA COLLECTION NOTES AND STATUS								
	NAME	FILE NAME	INTUIT LINK	COMMENTS	STATUS	🗘 LAST SAVED 📃 🔺			
	Simpson, Jessica (647) 777-7776 🛛	JessicaSimpson V2.123.15T	0/12	Payment is done.	Waiting For Client	Dec 16, 2016			
	Simo, Jessica (647) 777-7776 🛛 💌	T1 JessicaSimpson V2123.15T	0/12	Payment is done.	Completed	Dec 14, 2016			
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	John, Alexis (647) 949-6946 🖸	71 T2205_160.15T	Invite	Add Note	Work In Progress	Dec 16, 2016			

2. The "Invite Clients to Use Link" window opens. Select the "Edit" link from the "Engagement Letter" option.

Invite Clients To Use Link	×
To: Phil Wang 🛞	
Customize your invitation email below:	
Dear [CLIENTNAME],	
At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you. - We'll guide you through some questions, the documents needed, and let you know when you're done. - It's much more secure than sending by email so your personal information is safe! - Use your phone to snap photos of your documents much faster than using a scanner. Please sign up and get started. Regards, [FIRMNAME]	
Engagement Letter Questionnaire Checklist (6) Edit Im Do not include Im Do not include Im Do not include Im Do not include	
Cancel	

The "Edit Engagement Letter" editing window displays:



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	tter	
Letter of Er	rgagement • Add Delete	
Lett We Rev failu of oi arra We audi infor infor to p othe acc: retu	er of Engagement appreciate the opportunity to work with you and advise you on income tax matters. Canada enue Agency (CRA) impose penalties upon taxpayers, and upon us as tax return preparers, for re to observe due care in reporting on your income tax returns. In order to ensure an understanding ar mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following ngements. will prepare your personal income tax return based on information that you provide to us. We will not t or otherwise verify the data you submit, although we may ask you for clarification of some of the mation. It is our responsibility to prepare your tax return correctly according to the law and the mation that you have provided. It is your responsibility to provide us with all the information required repare complete and accurate returns. You should retain all the documents, cancelled cheques and r dat that form the basis of your income and deductions. These may be necessary to prove the uracy and completeness of the return to CRA. You have the final responsibility for the income tax m and, therefore, you should review it carefully before you sign it.	

- 3. Edit the letter content as required.
- 4. Click the "ADD" button above the letter content to save the engagement letter for future use.

Letter of Engagement	-	Add	Delete

The user is prompted to save the new template:

New Engagement Letter							
Enter new template name:	Basic Engagement Letter						
Cancel	OK						

- 5. Enter the name of the new template (e.g., "Basic Engagement Letter").
- 6. Click the "OK" button; the new template is saved in the menu and the content may be entered.



t Engagement Letter				X
Basic Engagement Letter	¥	Add	Delete	
Cancel				Done

- 7. Click the "Done" button; the template saves. It will be available under the drop-down menu when creating future engagement letters.
- 8. Click the "Invite" button in the "Invite Clients to Use Link":

	Engagement Letter Edit Do not include		Questionnaire Edit Do not include	Checklist (6 Edit Do not incl	i) ude
Cancel					Invite

The engagement letter is sent to the client.