



Four Template  
**DISENGAGEMENT  
LETTERS**

**GERALDINE**CARTER



## **Generic Stripped Down Version**

It is with mixed emotion that I share with you a change to our firm that will affect you: as of October 15th, 2022, our firm will no longer offer tax preparation for stand-alone personal tax returns.

In order to provide the level of service our clients expect and deserve, our firm is making necessary changes and will be serving business owners only.

Please know this decision has not been easy: many of you have become friends over the years. While I am saddened to say goodbye as clients, I look forward to remaining in contact as friends and colleagues.

I am grateful for having had the opportunity to serve you.

Regards,

## **Leave the Door Ajar**

It's with mixed emotion that I share news of changes being made to my tax practice.

In order to provide and maintain a high level of service, we are reducing the number of clients we can serve. As such, [or going forward] we will be pivoting our firm to serve [these types of clients] and related businesses only, beginning November 1st.

Historically, tax practices have billed hourly for work. We believe this does a disservice to clients. We believe clients deserve the best. As such, we have designed flat-rate service packages to meet the needs of [these types of clients] clients.

Should you be [or - if you are] interested in learning more about these services, please reach out to [this\_person] at [this\_email] or [this\_phone] to schedule a conversation.

If you are not [this kind of client], and are seeking a referral for tax preparation services, I offer [this\_name] as an excellent option. He is aware of the changes I am making to my business, and is ready to welcome referrals who choose to reach out to him.

## **100% See You Letter**

It's with mixed emotion that I share news of changes being made to my tax practice.

In order to provide and maintain a high level of service, we are reducing the number of clients we can serve. As such, [or going forward] we will be pivoting the business to serve [these types of clients] and related businesses only, beginning November 1st.

Please know that this decision does not come lightly - some of you were among my first clients and helped make this business a reality. I appreciate your trust in me and would like to make sure you are well taken care of [or well looked after].

If you are seeking a recommendation for a new tax preparer, you can reach out to [this\_name] at [this\_phone\_number]. I have worked with [this\_name] in the past. He is aware of the changes I am making to my business, and is ready to welcome referrals who choose to reach out to him.

## **Another Version**

It's with mixed emotion that I share news of changes being made to my tax practice.

Due to the increasing complexity of taxes, coupled with inflation and increasing costs of working and serving in the [our\_region], we are making difficult but necessary decisions and changes to our practice.

In order to maintain the high level of service that you expect and deserve, we will be limiting capacity to 300 clients, whereas in 2022 we served more than 500 clients. In addition, we will be increasing prices, as we have not done so since [year].

We value having you as a client, and would like to keep serving you. If you would like us to prepare and file your 2022 tax return, the price for 2022 tax return preparation and filing is [\$xxx]. If you would like to continue to receive tax services from us, please let me know, by doing [this\_action].

I understand this option may not be right for everyone. I wanted to alert you of this change with plenty of time to find an alternative if you so choose.

If you would like a referral for tax preparation services, please contact my office, and we can make suggestions.

Please know that these decisions have not come lightly. Some of you were among my first clients and helped make this business a reality. I appreciate your trust in me.

Regardless of your choice, I wish you the best in 2023.

## **CONSIDERATIONS:**

Create a list of possible providers / options.

If you don't know anyone with capacity, your state society may be an option as a starting point for their search.

Anticipate and think through:

- Your response plan in advance, so you are confident you can handle anything that comes back
- Your staff's need for scripts and guidance on how to handle client phone calls
- Your communication or script if payment is still owed
- What you will give clients in their transition - in support, past returns, other documents, etc.

Remember: the risk of "over-culling" is low, given marketplace demand.

## **SCRIPT FOR FRONT DESK/STAFF**

Thank you for reaching out.

Yes, these are the changes that are occurring, and we understand that there may be an impact to you.

[The\_owner] is not available at the moment, but I am meeting with her later today, and I can bring your questions to her.

She or I will get back to you before the end of the day tomorrow.

Thank you and speak to you soon.