

[Your business name]

[Street address, city, state ZIP]
[Phone] · [Email] · [Website]
PTIN [P00000000] · EIN [00-0000000] · [EA / CPA / AFSP, if held]

INVOICE

Invoice # [0001]
Date [MM/DD/YYYY]
Due [MM/DD/YYYY]
Tax year [year] — [original / extended / amended]

BILL TO

[Customer name]
[Street address]
[City, state ZIP]
[Phone or email]

ENGAGEMENT

[Tax year] returns — [forms and schedules]
[Bookkeeping / payroll — period, if any]
Documents received [date] · draft reviewed [date]

DESCRIPTION	QTY	RATE	AMOUNT
Form 1040 — federal individual return [E-filing and a PDF copy included]			
Schedule [C / E / D / F] — [what it covers]			
[State] return [and city / school district return]			
Forms 1099-NEC prepared and e-filed — [n] contractors			
[Extension / amended return / IRS letter response] [Year; what was done]			
Monthly bookkeeping — [month] [Accounts reconciled; report sent]			
Subtotal			
Sales tax / GST / VAT ([rate]%)			
Deposit received			

Balance due

PAYMENT

[Due before e-filing, by [date]. How to pay.]

WHAT'S NEXT

[Record-keeping period; next estimate date; next season's checklist.]