



KAREN ECKSTEIN  
LIMITED



# Close the Circle<sup>®</sup>

Do you know what is in your engagement  
letter and terms of business?

When did you last review them?

Are they up to date and fit for purpose?



In any dispute or disagreement between you and your client, the engagement letter and terms of business are the first port of call to determine the terms of the contract between you and your client.

### **Do your retainer documents:**

- Enable you to charge increased fees if the scope of the retainer alters?
- Enable you to extend the scope of retainer after the initial instruction?
- Give you protection for claims by third parties?
- Protect you from claims arising as a result of late or inaccurate information provided to you by your clients?
- Protect your staff from claims brought against them personally by clients?
- Enable you to report errors in clients' reported tax affairs to HMRC?
- Deal with the situation where there is an internal dispute within your client?



**Are your liability caps valid or do you unknowingly face unlimited liability to your clients and third parties?**  
.....

**Are you properly identifying and dealing with consumers and cancellation notices?**  
.....

**Are you confident that your engagement letters are enforceable?**  
.....

**Have you got good systems in place to ensure that your engagement letters have been received, agreed and reviewed when necessary?**  
.....

### **Close the Circle® can help!**

The Close the Circle® service reviews your engagement letters and terms of business to ensure that they are fit for purpose, so that you can be confident they are suitable for your practice.

A review can be undertaken of your processes and systems and advice given to enable you to ensure that letters are issued, returned and reviewed when required.

### **Why take the risk?**



## What do our clients say?

“Karen reviewed and updated all of our terms of engagement documents. ... Valuable suggestions were made by Karen and we happily accepted them all. It was a quick process and now I have peace of mind that our engagement documents remain fit for purpose.”

Accountancy Firm

“We have known and trusted Karen’s expertise for years. Always reassuring to deal with a real expert in the field. Karen’s in depth understanding helps her quickly understand the issues and provide quality legal guidance. Advice we obtained from her on a recent project [on engagement letters] was swiftly supplied, clear and great value.”

Professional Indemnity Broker

“Just listening to you [lecturing on engagement letters and liability caps]. Great to be listening to a professional who is clearly experienced and knowledgeable in their area. Great tips and process observations”

Tax Adviser

**Our fees are transparent and agreed in advance, so that you remain in control and are not left with an unexpected bill.**

To find out more about the Close the Circle® service, our fees and our onboarding process, contact Karen at [hello@kareneckstein.co.uk](mailto:hello@kareneckstein.co.uk) or on **07973627039**.