Date: [Date]

To: [Tax Professional/Firm Name]
Address: [Street Address]
City, State, Zip: [City, State, Zip Code]

Subject: Letter of Instruction for Tax Filing and Settlement - [Tax Year]

Dear [Name of Accountant or Tax Professional],

This letter serves as your formal instruction to prepare and file the federal and state income tax returns for [Your Name / Business Name] for the tax year ending [Year].

1. Scope of Services
Please perform the following actions:

- Review all provided financial statements, forms (W-2, 1099, etc.), and supporting documentation.
- Prepare the required [Individual/Corporate/Partnership] tax returns.
- Identify all eligible deductions and credits to minimize tax liability.

2. Settlement Instructions
Upon completion of the filing, please proceed as follows regarding the tax settlement:

- **In the event of a Refund:** Please arrange for the funds to be [deposited directly into the account on file / issued via check].
- **In the event of a Tax Liability:** Please notify me of the exact amount due at least [Number] days before the filing deadline. I authorize you to [initiate an electronic funds withdrawal / provide me with payment vouchers] for the settlement of the balance.

3. Submission and Deadlines
I request that the returns be filed electronically no later than [Date]. Please provide me with a complete copy of the filed returns and the confirmation of acceptance from the tax authorities for my records.

4. Authorization
I certify that the information provided to you is accurate and complete to the best of my knowledge. You are authorized to represent [Your Name / Business Name] in communications with tax authorities regarding these specific filings.

Please contact me at [Phone Number] or [Email Address] if you require further documentation or clarification.

Sincerely,

[Your Signature]

[Your Printed Name]
[Your Title, if applicable]
[Your Tax ID / SSN - Optional]