

The Engagement Letter e-form is a tool that assists with the efficient production of most engagement letters, tailored to the specific requirements of the client. However, it is likely that small edits may be required to the generated letter to meet exactly the requirements of the firm.

The e-form is an online based tool, meaning there is no requirement to uninstall and reinstall programs. Users can also take confidence that the most up to date version is available at all times.

Completing the questions on the e-Form and clicking the ‘Submit’ button at the end will produce your customised engagement letter in a word document which you can then download.

1. The e-form takes about 10-20 minutes to complete, depending on the number of services you are providing, so please allow yourself sufficient time to answer the questions.
2. To ensure that you have all the answers you need before you being completing the e-form, please refer to the full set of questions, with notes, attached.
3. The system will remember certain permanent information that you key in (such as your firm’s contact details, professional body etc) so you need not re-enter such key information every time you start a new form.
4. You will be able to save a form mid-way and come back to it later by clicking the ‘Save draft’ button, but please be aware that if you start a new form before you have completed the saved form, the changes you have saved will be lost.
5. Mandatory questions are indicated with an asterisk (*). You will not be able to move forwards in the form if a mandatory question has been left unanswered.
6. There are information icons throughout the form which provide additional information or guidance on certain questions. Clicking on these icons brings up a pop-up box containing the information, click on the icon again to remove the pop-up.
7. You can review your answers on page 16. Once you have clicked on ‘Submit’ on page 16, you will not be able to revise your answers, so please ensure that you have checked your answers before clicking the ‘Submit’ button.
8. If you would like to keep a copy of your answers on page 16, please use the print function at the bottom of the page. This will allow you to either print, or save as PDF. Alternatively, you can also download your answers in excel format by clicking the ‘Export your submission as an excel file’ link on page 17.

NOTE: Using your own Standard Terms of Business (STOB)

If you are using your firm’s own STOB, you will be required to manually insert it at the end of your customised word document as the e-form does not support the uploading of documents.

If you have any further questions, our Client Experience team can be contacted at 0800 231 5199.