

INVOICE

FROM
Your business name
Address
Phone · email

BILL TO
Client name
Client address
Phone · email

INVOICE #

DATE

DUE DATE

CLIENT ENTITY / PERIOD

ENGAGEMENT REF.

PTIN / LICENSE #

DESCRIPTION	QTY × RATE	AMOUNT
Monthly package: period, scope included (flat)		
Hourly: task, period (hours × rate)		
Tax preparation: form, tax year, schedules / states		
Payroll: period, runs × rate or employees × rate		
Software subscription passed through: name, period		
Retainer applied / credit (negative)		

NOTES & PAYMENT TERMS
Monthly packages are billed on the 1st and due on receipt; project and tax work is due within 15 days of invoice. Tax returns are filed on receipt of payment. Software subscriptions are billed at cost. A late fee of 1.5% per month applies to balances over 30 days.

Subtotal

Tax

TOTAL DUE