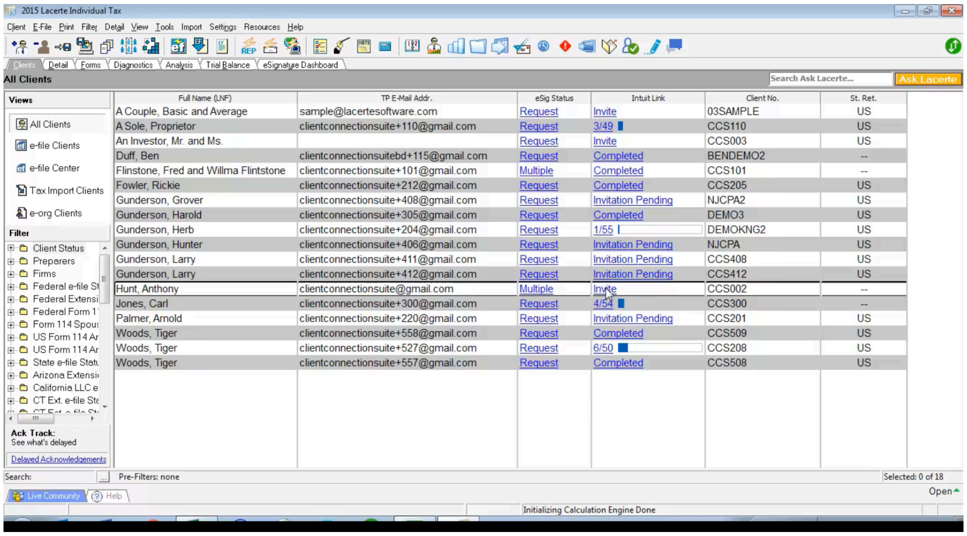
Intuit Link: How to Personalize an Engagement Letter

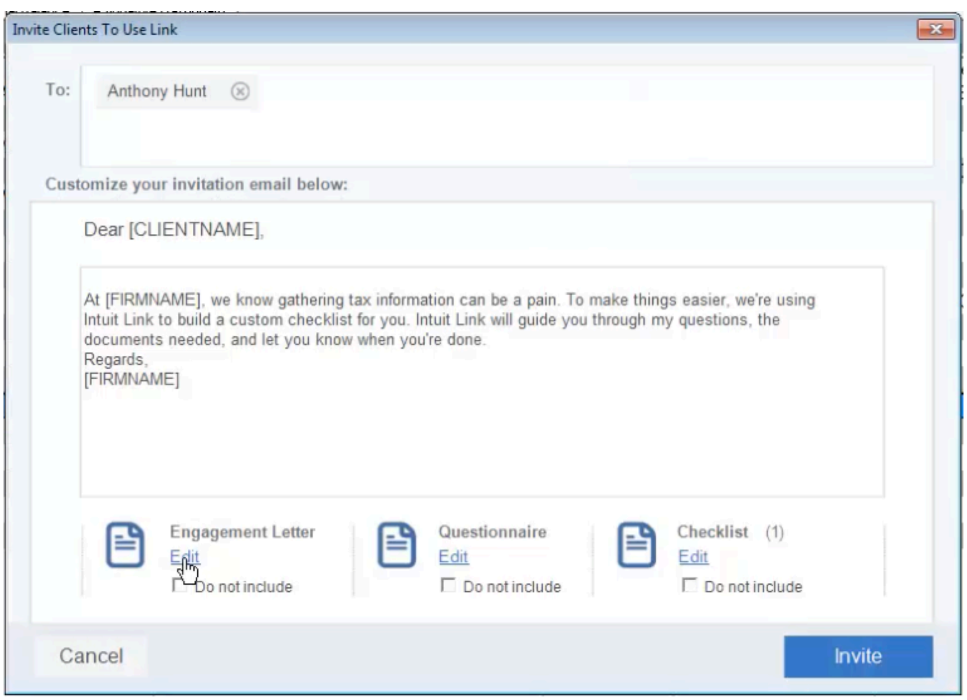
There are two options to personalize an engagement letter.

First Option: Use your organizer section in the prior year program

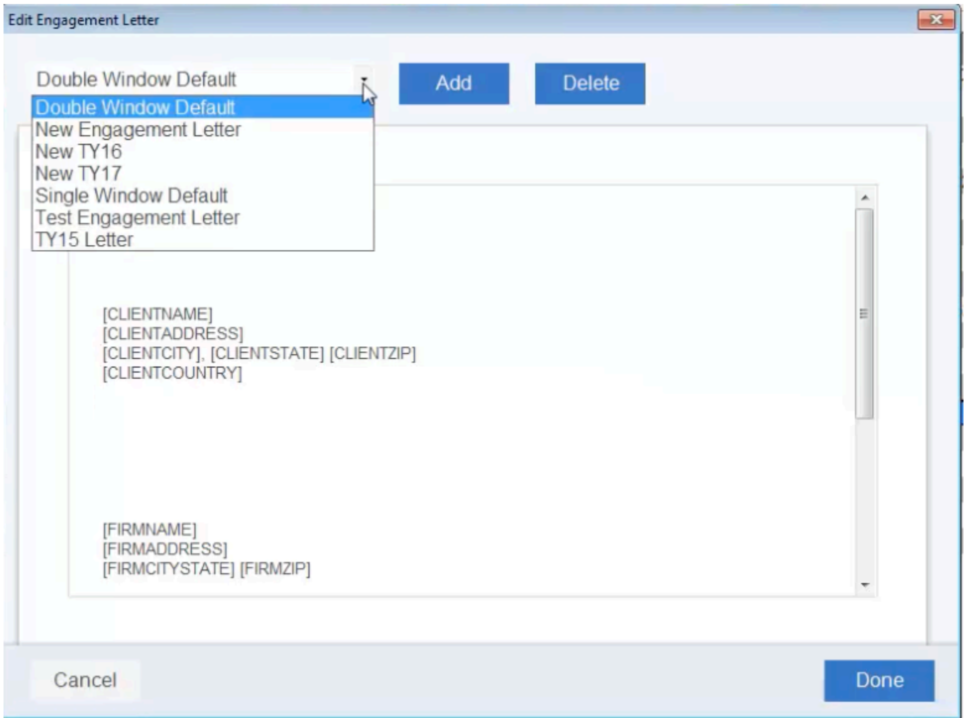
Step 1: Click the "Invite" Button



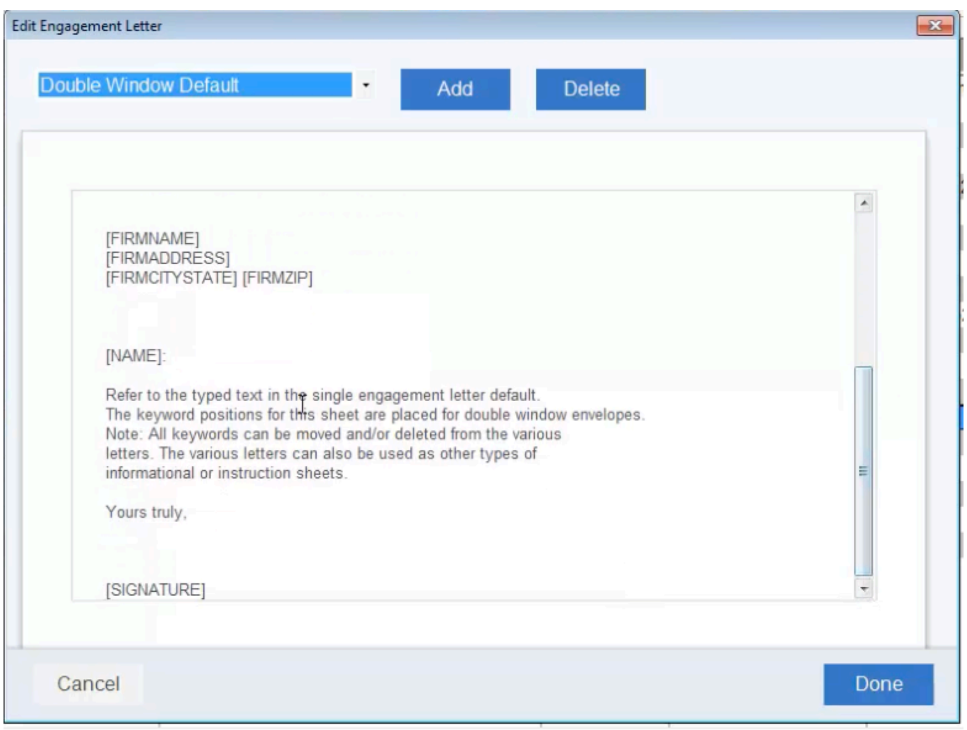
This generates the email wizard and template to send to your customers.
Step 2: Locate the engagement section and then click "edit."



If you already have your engagement letter stored in the organizer portion of lacerate it will be located in this drop down menu.

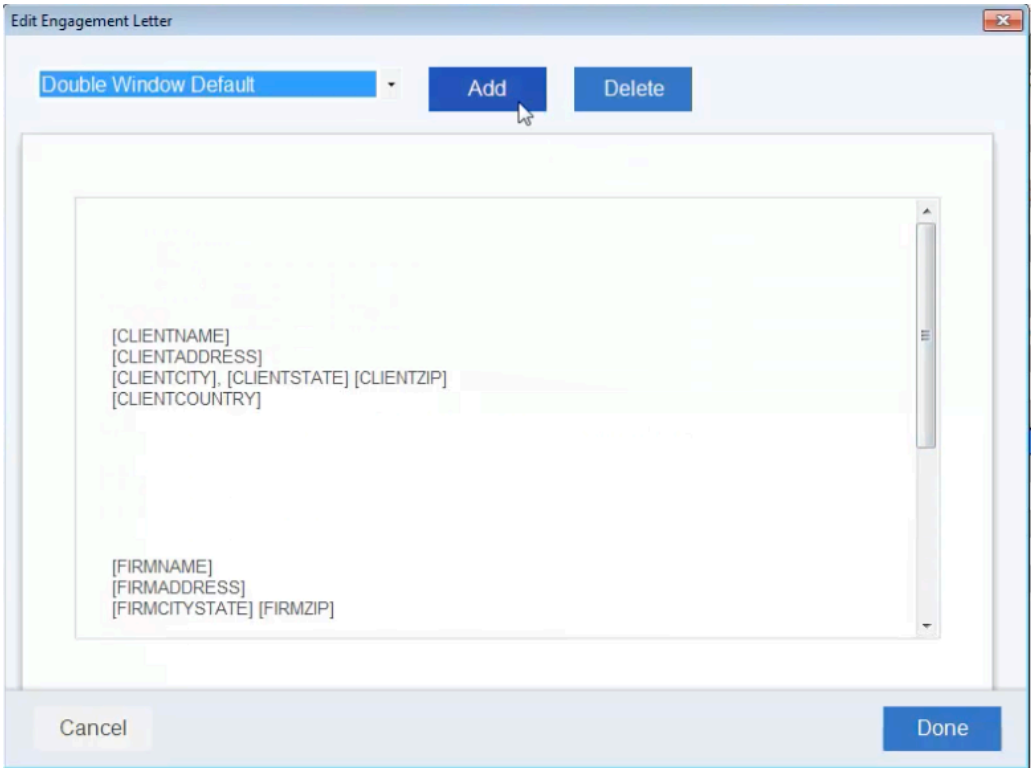


If not, we have some standard templates that you can use and customize moving forward.

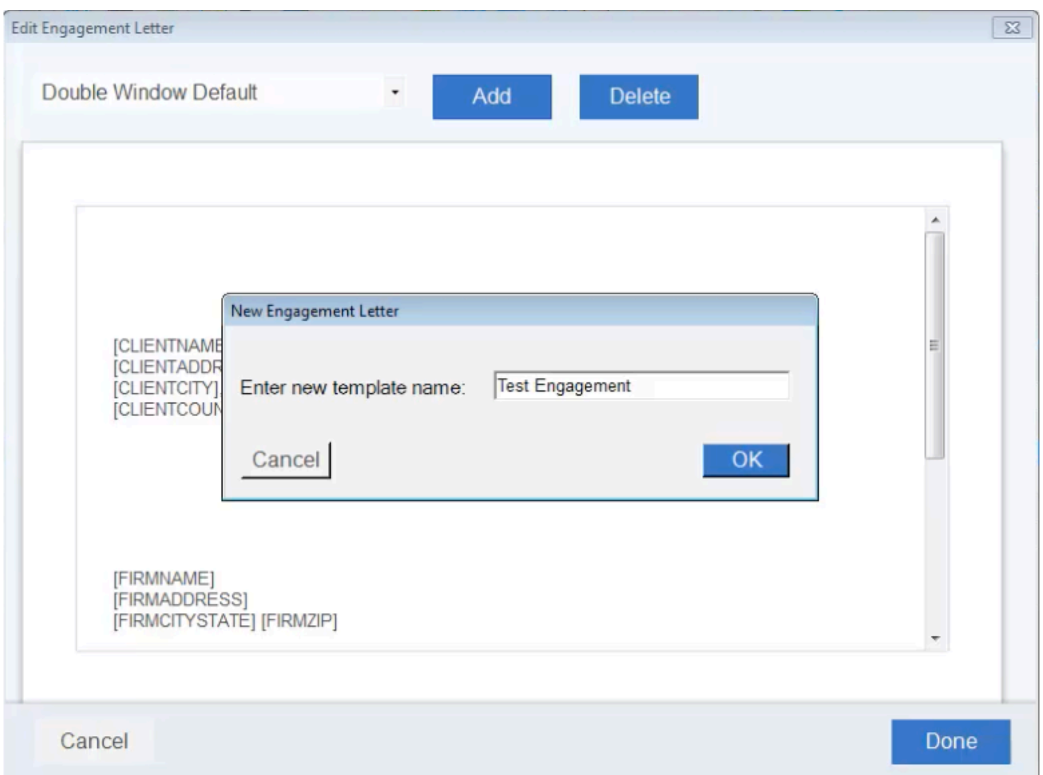


Second Option: Add new engagement letter.

Step 1: Click the “Add” button

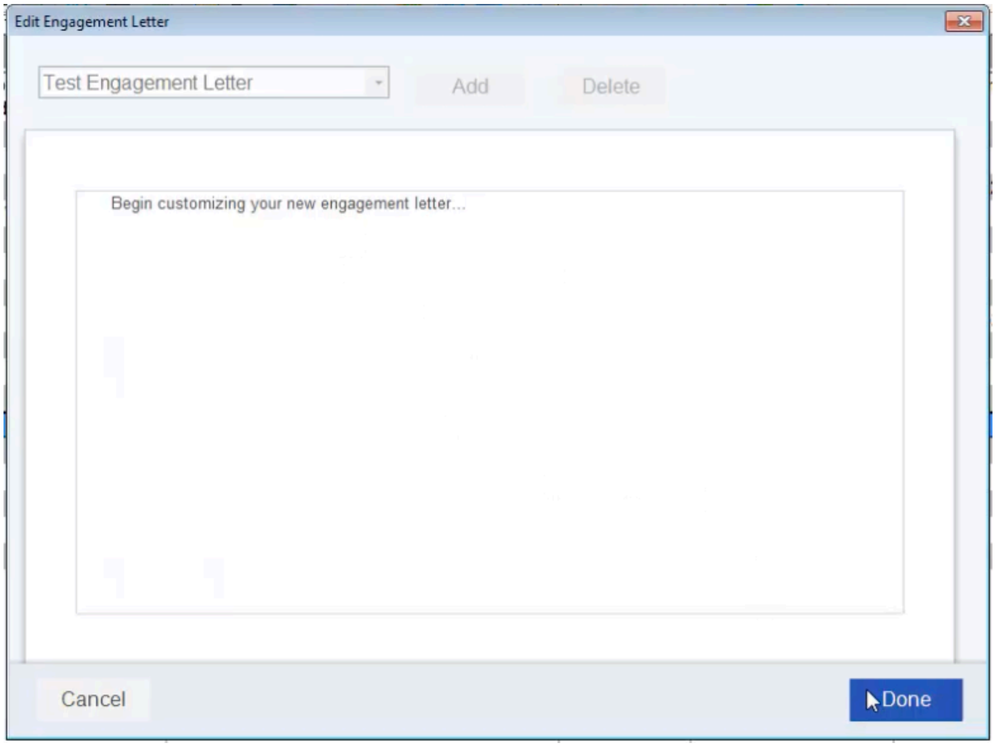


Step 2: Name your engagement letter – then click okay



Step 3: Customize letter add text.

Step 4: Once everything looks the way you want it, click "Done"



Step 5: When asked if you want to save, click "Yes"