

## HubSync Engagement Letter Wizard

Send 1,000s of configurable Engagement Letter with ease.

HubSync's Engagement Letter Wizard module, allows firms to quickly create engagement letters with standardized firm templates and deliver to prospects and clients for electronic signature.

HubSync integrates with the firm's sources of truth to collect CRM, Time & Billing, and compliance software information to incorporate directly into client letters, saving the firm significant time and money.

- Build and house standardized templates
- ⚡ Create "Building Blocks" of language to exist across multiple templates. Update the block once and all templates update automatically.
- ⚡ Insert conditional logic to apply standardized language based on the client and services to be performed
- ⚡ Create a wizard experience for users to quickly create letters
- ⚡ Risk-management controls to ensure the latest approved templates and language is used every-time
- ⚡ Provide help text and tooltips for users along the way
- ⚡ Route documents to appropriate levels of review and approval
- ⚡ Red-lining capability to reject/approve proposed changes
- ⚡ Easily and quickly track the status of all engagement letters
- ⚡ Signed engagement letters stored in HubSync with the ability to route to the firm's Document Management System or the client's workspace in HubSync

**By formalizing your engagement letters and strategy, you will see:**

- Quicker turnaround times
- A modern client experience
- Significant cost and time savings
- A reduction in risk due to the controlled customized content

**As a firm professional, quickly select hundreds or thousands of clients to receive an engagement letter for signature.**

This process will:

- Remove the angst of searching for the latest approved templates
- Allow for data from CRM, Time & Billing, and compliance softwares to automatically flow into the engagement letter
- Eliminate the concern that data (client information, contacts, projects, etc.) is out of date
- Provide for a stream-lined review and approval process
- Track the status of all engagement letters in one place

## Comprehensive Real-Time Tracking

For every step in the process

All engagement letters

Quick Search Filtered by 1 field Grouped by 1 field Sort Row Height Export 1 Selected Fields (21) Save View Default

Group	Partner	Client Name	Client ID	Status	Routing map	Signed Document
> Approved (5)				Approved	View	
> Signing in Process (5)				Signing in Process	View	
> In Review (59)				In Review	View	
> Canceled (1)				Canceled	View	
> Expired (10)				Expired	View	
> Completed (3)				Completed	View	
<input checked="" type="checkbox"/>	Tiffany Roussel	ABC Company	1	Completed	View	<b>ABC Company</b> Create Tiffany Roussel 2/1/2024 Internal review Tiffany Roussel 2/1/2024 Sign Tiffany Roussel 2/1/2024
<input type="checkbox"/>	Tiffany Roussel	ABC Company	1	Completed	View	
<input type="checkbox"/>	Davis Moore	ABC Company	1	Completed	View	
> Changes Requested (2)				Changes Requested	View	

Configurable templates to create building blocks, steps, and conditions to ensuring approved language is used with every delivery.

Walk your users through a wizard to ensure the correct language is added at every step. The steps of the wizard are fully configurable by template.

Provides a modern review process to ensure proposed changes are approved by the correct parties.

Audit

Audit General Eng.

Next

HubSync

Engagement Letters Files Databases People Activity

Audit General Engagement Letter Template

Image Table Link Table of Contents Make Building Block Make Conditional Insert Field Insert Signature Header Footer Page Setup Page Number Break Insert Footnote

Building Blocks Steps

- General Info
- Management Responsibilities
- Nonattest Services
- Reporting
- Other
- Other 2
- Mediation & Limited Indemnity

CPA

CDR 201 AUDIT ENGAGEMENT LETTER  
Audit General - Updated October 2023

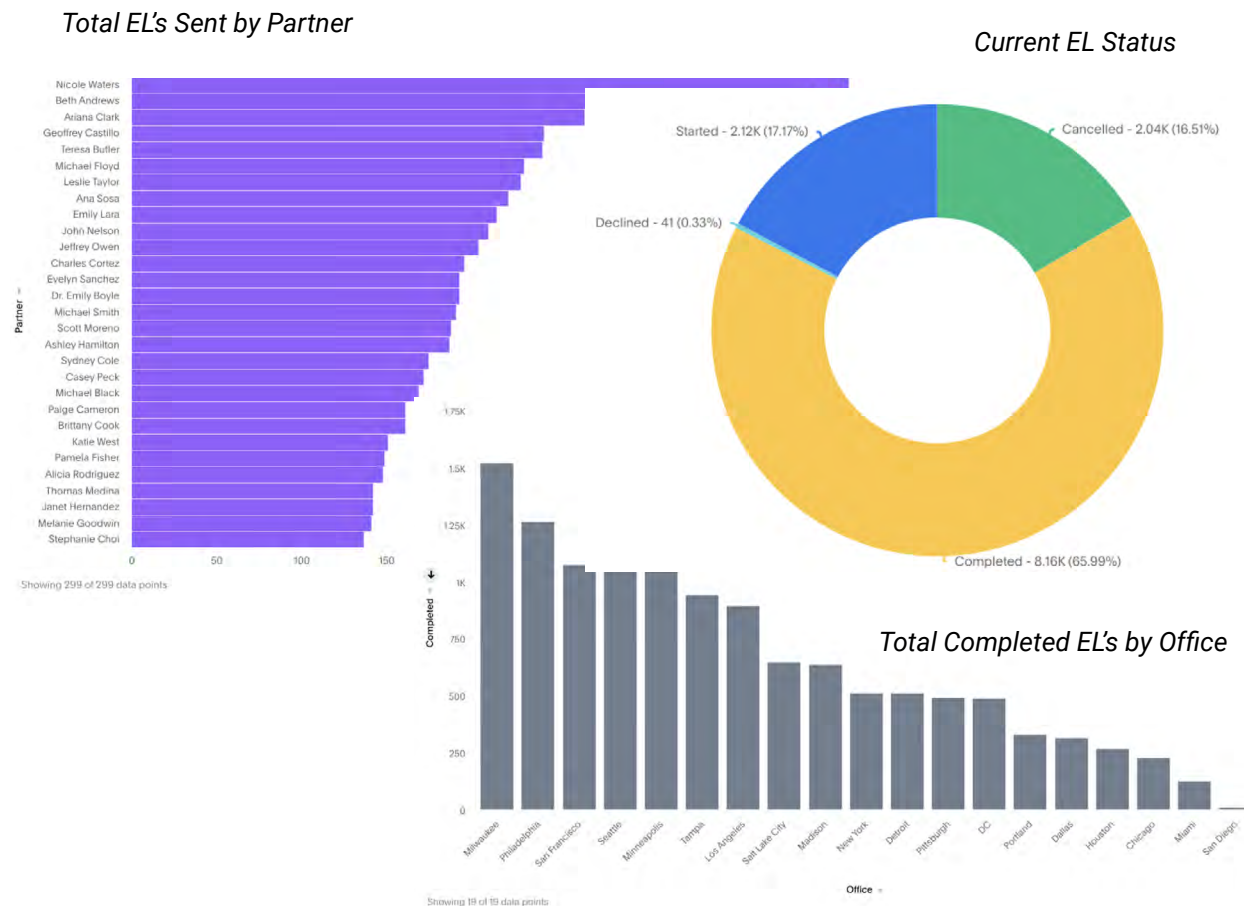
[Letter Date]

[Client Name]  
[Client address Line 1] [Client address Line 2]  
[Client address City] [Client address State/province] [Client address Zip]

You have requested that we audit the financial statements of (Client Name), (Balance Sheet) as of (Balance Sheet Date), and the related statements of (open) for the year then ended, and the related notes to the financial statements. We our acceptance and our understanding of this audit engagement by means of this letter.

The objectives of our audit are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, report that includes our opinion. Reasonable assurance is a high level of assurance but it not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America (GAAS) will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from considered material if there is a substantial likelihood that, individually or in the influence the judgment made by a reasonable user based on the financial statement

## Real-time dashboard provides KPIs for all engagement letters.



HubSync leverages e-sign functionality to deliver the documents for electronic signature.

A client will:

- ⚡ Receive a secure link in a firm branded customized email
- ⚡ Review the document
- ⚡ Sign

It's that easy!